Chapter Eleven:
Board of Institutional Review Member Skills and Competencies

Introduction
This chapter describes the knowledge and skills of members of the Board of Institutional Review (BIR). BIR members complete activities that are central to the quality and success of the accreditation system that oversees the educator preparation programs in California. The BIR is a group of K-12 and higher education educators, administrators, and policymakers who are trained and assigned to work in pairs or small groups to review documents, conduct interviews, and develop consensus decisions around an institution's alignment with Commission-adopted standards.

I. Selection of BIR Members
Individuals are selected for membership in the BIR based on the recommendation of a colleague, the individual's knowledge of the *Accreditation Framework*, and demonstration of the skills necessary for a successful accreditation visit. During the BIR training, prospective members participate in activities designed to develop the skills required during a site visit. BIR members assigned to a site visit are expected to utilize the skills outlined in this chapter during the visit and, if necessary, to request assistance or guidance from the team lead and/or the Commission consultant.

Qualifications of a prospective BIR member include**:**
- At least three years of professional experience in education;
- Experience with qualitative evaluations;
- Experience with education related standards;
- Personal characteristics including integrity, objectivity, empathy, ability to work under pressure, organizational ability, time management, and being a team player;
- Experience with collaboration in writing and problem solving;
- Good communication skills (both oral and written);
- Experience with data collection and analysis;
- Familiarity with technology; and
- Ability to access electronic information, search for pertinent information, and appropriately cite sources for inclusion in the team report.

II. BIR Member Responsibilities
BIR members' primary responsibilities are to review and analyze evidence provided by educator preparation institutions, examine source documents referenced in evidence submitted, interview individuals who are knowledgeable about specific educator preparation programs at institutions under review, and determine the extent to which an education unit or its programs are aligned to Commission-adopted standards. With regard to evidence reviews, BIR members may be assigned to work in pairs to complete an Initial Program Review (see Chapter Three), or a Program Review or Common Standards submission (Chapter Six). Alternatively, a BIR member may be assigned as part of a team to complete an accreditation

site visit (Chapter Ten). Site visits utilize the full array of BIR member skills, including evidence review, analyses of reference documents, interview skills, and the capacity to participate in team meetings during which every member contributes their concerns, shares new information, and cooperates to develop a set of consensus decisions reflecting the teams' best professional judgment.

Initial Program Review (IPR)
This type of review occurs throughout the year. The outcome of the initial review of the program proposal is a set of responses for each program standard. The reviewers must agree whether there is sufficient evidence contained in the submission to find that each program standard is met. If not, the reviewers must identify the nature of the information that is not addressed or is not documented. Institutions then revise the program proposal and resubmit with additional documentation. The revisions are reviewed and a determination is made as to whether each standard has been satisfied. If and when all adopted program standards are met, the program proposal will be presented for consideration and possible approval by the Committee on Accreditation (COA). For more information on the initial approval of programs, please see Chapter Three.

Program Review and Common Standards Submissions
BIR members are also instrumental in the Program Review and Common Standards review process (Chapter Six) which occurs in the fifth year of the accreditation cycle. Performing Program Review requires reading and analyzing brief program narratives, course syllabi, assessments, and other required documentation. When the assigned member pairs have completed their independent reviews, they discuss their findings and reach agreement on whether each program standard is preliminary aligned or, if not, where additional information is needed. The pair will develop the *Program Review Preliminary Report of Findings (PRF)* that reflects the result of their deliberations. The *Preliminary Report of Findings* is sent to the institution which prepares an addendum prior to the visit for review by the site visit team.

During the fifth year of the accreditation cycle, responses to the Common Standards are also reviewed by BIR members. Specific evidence regarding the implementation of the Common Standards combined with evidence/documentation submitted during Program Review are examined by BIR team members to provide a *Common Standards Preliminary Report of Findings* to the institution. The institution will prepare an addendum for the team prior to the site visit. It is anticipated that a subset of Program Review and Common Standards review team members will serve on the site visit team in Year Six.

Accreditation Site Visits
BIR members participate in accreditation site visits that generally run for four days (traditionally Sunday through Wednesday). In cases where institutions offer only one or two programs, the site visit may be three days in length (traditionally Monday through Wednesday). Prior to the visits, the team members will receive (and must review) evidence submitted on the institution's accreditation website which includes the following items:

1. Preconditions for each approved educator preparation program
2. Common Standards Responses, Common Standards Preliminary Report of Findings, and an Addendum to the Common Standards addressing reviewer feedback and questions
3. Program Review submissions, Preliminary Report of Findings, and Addendums addressing reviewer feedback and questions for all adopted program standards for each Commission-approved educator preparation program
4. Data, including survey data submitted to the Commission since the last site visit, (which can be found on the Commission's Annual Data Dashboard)
5. Any additional information provided by the institution and its programs on its accreditation website.

The purpose of the site visit is for the BIR team to make decisions on standards - each of the Common Standards and, for all approved programs, the Program Standards. Soon after the team convenes at the site, team members will share their understandings and any concerns they have of each educator preparation program at the institution and about the institution's education unit. Throughout the site visit, every team member will be utilizing a wide variety of skills from document review, interview, writing, analytical, and communication skills, to ensure that the institution receives a fair, impartial, and thorough review of its overall functioning and the functioning of each individual educator preparation program offered.

III. BIR Member Tasks and Skills
In order to effectively and efficiently complete the responsibilities identified above, every BIR member must be skilled to complete a variety of critical functions. Each of the core tasks and necessary skills is identified and defined in this section. The table below identifies which of the tasks are utilized by each of the Commission's accreditation activities.

BIR Member Tasks	Initial Program Review	Program Review	Common Standards Response	Site Visit
Reading and Analyzing Documents	Yes	Yes	Yes	Yes
Site Visit Interviews				Yes
Decision Making Considerations	Yes	Yes	Yes	Yes
Preparing Preliminary Report of Findings	Yes	Yes	Yes	
Reviewing all available information against the standards to determine alignment	Yes	Yes	Yes	Yes
Writing the Accreditation Report				Yes

Reading and Analyzing Documents
Both Program Review and responses to the Common Standards require the submission of specific evidence rather than lengthy narratives. Therefore, the initial task that faces BIR

members in all of the accreditation assignments is reading and analyzing specific documentation. Below are some techniques that may assist in this critical task.

Respect Institutional Mission and Goals

Institutions and their programs are permitted to meet adopted standards in their own ways and in alignment with the institution's own mission and goals. There is no one best way of preparing educators. The team's task is to ensure that there is a preponderance of evidence to support that the institution or program is meeting the standards and that the institution and its program(s) are providing a quality educational experience. The exact means to this common end will vary. Team members must be aware that such variances are perfectly permissible.

Identify Whether All Required Documentation is Present

Programs are required to submit key pieces of evidence, as identified in Chapter Six of this *Handbook.* These requirements eliminate the need for lengthy narratives. To determine whether the institution or program meets the relevant standards, it is important to initially identify that all required evidence has been submitted.

Determine Relationships

Programs are required to submit an organizational chart or other graphic representation of the program and its place within the institution. The chart can be helpful in learning how the institution and its program(s) are organized and operated and to identify key reporting relationships that may clarify how critical functions are completed.

Review Documents Thoroughly

Reviewers should thoroughly review the content of all evidence submitted. While the Commission encourages institutions to submit well organized and easily navigable evidence, team members should not base their determination of program quality on the presentation style of evidence submitted. If, however, evidence of alignment to the standards cannot be found within the content that is submitted, reviewers must not assume it is present; rather, reviewers should request clarification and/or additional evidence from the institution. Reviewers should base their decisions on what they have been able to confirm from various sources about the institution and its programs.

Investigate Omissions

In some cases, omissions in a report can reveal a great deal about the institution or program. As documents are being reviewed, reviewers should ask themselves, "What is not being presented?", or "What is in the background?" Reviewer familiarity with the credential area can be a great help here. Noted omissions should not lead to assumptions about institutional or program quality, but they may help focus further examination, guide reviewer feedback, and help pose some questions that can be further investigated during the site visit.

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Deleted: If reviewers are unable to properly review evidence submitted because of poor presentation quality, the team lead and state consultant canwill make contact with the institution to have them revise their submission. is to look beyond the presentation and examine the content. High quality presentation does not always reflect high quality content.   Likewise, documents that are poorly presented may not accurately reflect the quality of the work going on at the institution. While the Commission encourages institutions to prepare high quality documents, when presented with a weak document, the reviewer may need to communicate more frequently with the state consultant and (at a site visit) with the team lead to ensure the reviewer has sufficient information to make an informed decision about how well the standards are being addressed.

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Try to understand what the program looks like from the perspective of a candidate entering it. Reviewers may find it helpful to ask themselves "What activities, documents, and experiences are provided to the candidate or asked of the candidate?" Once evidence is gathered, the reviewer should put it all together to see whether the entire process makes sense for a hypothetical candidate – from admission through coursework and fieldwork to program completion. This process can help identify whether there are any gaps in the information presented, or it may help rectify or confirm contrary pieces of information gathered from other sources.

Verify Claims
If an institution makes a claim, the institution must be able to verify that claim through evidence and/or interviews. This is the kind of information the BIR team member can identify during Program Review and alert a site team member to verify. During the site visit, evidence cited in any of the reports should be available for the team to review. If the team members conclude that claims regarding the effective operation of an institution's educator preparation program(s) are made without supporting documentation, the team lead and consultant should be informed so they can include that information in the mid-visit report. It is critical that reviewers, during Program Review, Common Standards Review, and the site visit, examine documentation to ensure that these claims are accurate.

Describe What Documentation Must be Reviewed at the Site Visit (Common Standards and Program Review Only)
If the program documents provide an adequate description of how the institution responds to a standard, and are supported by evidence provided in Program Review, the program reviewer will indicate on the *Preliminary Report of Findings* that the standard is preliminarily aligned. The same process applies for the Common Standards Review. However, if the Program Review and the Common Standards Review do not provide adequate evidence that a standard is preliminarily aligned, the site visit reviewer must seek additional information. In many cases, the program reviewer and Common Standards reviewer will identify the types of evidence that the site visit reviewer should examine during the site visit.

Site Visit Interviews
A critical method of obtaining sufficient data to make a determination of institutional and program quality and effectiveness is through interviewing many individuals with direct knowledge of the institution or program. It is important that a sufficient number of people from all the major constituencies related to that program (including, but not limited to, faculty and administration from the institution, candidates, cooperating/mentor teachers and school administrators, graduates of the programs and their employers, and advisory groups to the programs) be interviewed carefully about their experiences with the institution and the program in relation to the standards. The institution should invite all members of these constituency groups to be interviewed rather than selectively inviting or encouraging particular individuals to take part in interviews.

If Program Review determined that the program is not aligned with significant parts of standards, or whole standards, the Administrator of Accreditation may add a member to the site visit team to focus exclusively on that program. For programs with standards that are all preliminarily aligned, or that have small parts of standards not aligned, each team member will likely be assigned more than one program to review. To maximize valuable interview time, these team members may interview similar groups from multiple programs at the same time (e.g., advisory board members from the multiple subject, single subject, and education specialist programs.) This process is called "sampling" and allows the team to gather information from "samples" of individuals rather than from multiple members of a particular type for each program. Some interviews will continue to be scheduled with single individuals (e.g., department chairperson). The team lead and State consultant will be able to clarify the interview responsibilities of any particular team member.

Reviewers should have some prepared questions in mind based on team discussions and the constituency of the person/people being interviewed. Depending on the initial responses to a question, follow-up questions may vary significantly. The information that follows is intended to help team members improve their interviewing skills and complete the review task effectively. The purpose of interviews at a site visit is to obtain specific information that allows the reviewers to determine whether the institution and its programs are meeting Commission adopted standards.

Introductory Comments and Setting the Tone
The interview begins with introductions that include the team member's name and identifies the team member as a member of the Accreditation Team for the Commission. Depending on who is being interviewed (particularly for candidates), it may be necessary to provide a brief explanation of the purpose of the accreditation site visit. Make sure not to make it sound like a punitive or a "gotcha" process, but rather a regular review process to ensure quality and to make recommendations for improvement, if necessary.

During the site visit, team members are not representing their own institutions, nor are they using experiences at their own institutions as standards for the review. Identifying as a member of the accreditation team is important in two respects. First, when reviewers introduce themselves during interviews, they need to explicitly state that they are representing the Commission because their role as interviewers is performed on behalf of the Commission. It is not appropriate for a team member to identify their own institutional affiliation even though some individuals may inquire about it. Second, while it might be tempting for a team member to compare the host institution with their own, reviewers must analyze all information gained from the visit in relation to the standards. Whether the host institution's practices are similar to, or different from, their own institution is immaterial. Team members should listen carefully to the content of interviewee comments in relation to the standards and to ask follow-up questions that shed greater light on how the institution responds to the standards.

Explain Why Each Person Is Being Interviewed

Explain the purpose of the interview and the types of questions that will be asked. Tthe questions should vary depending on the constituency being interviewed. Questions should be geared toward what that constituency would likely know, understand, and experience in the program. For instance, when interviewing cooperating teachers, you may introduce yourself as follows: "I am here to ask you some questions about the preparation of student teachers you have worked with from _____ Institution and your role and experiences in the program."

Reduce Anxiety

Some individuals will be anxious, and a few may be reluctant to speak. Team members should be gracious and ease into the questions by asking some general questions. It might also reduce the interviewees' anxiety to know that their comments will be kept confidential and that findings will be reported in the aggregate so that no particular comment can be traced back to an individual.

Assure Confidentiality

Team members must be certain to inform interviewees that any information shared will be kept strictly confidential and that only aggregate data will be reported to the institution. This is particularly important with candidates in the program and, often, with program faculty.

Maintain a Professional Perspective

Team members must use their skills and experiences to focus directly on gathering and analyzing data to determine how well the program meets Commission-adopted standards. They must be as objective as possible at all times and should avoid making comparisons between their institutions and the institution under review as such comments may be interpreted as demonstrating bias, even if unintended.

Confirm Understanding

It is important that reviewers confirm that they have heard and correctly understood comments made by interviewees. The interviewer can do this by paraphrasing back to the interviewee the main idea contained in the interviewee's comment. This practice encourages the interviewees to clarify something the interviewer had not understood correctly and to elaborate on their previous response.

Take Notes

Team members must take careful notes. This becomes particularly important when conflicting responses are received by several team members. Reviewers should frequently consult their notes during deliberations because, by then, the reviewer has conducted numerous interviews and met numerous people over the course of the site visit, and they need to make sure they are reporting their findings accurately and completely. Reviewers can make note of similar responses on a specific item to identify patterns of evidence on a particular standard.

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Ask Questions Related to Standards

It is important to ask questions that will help the team determine whether specific standards are Met. It is helpful to use the language of the standard to craft interview questions. Team members should focus their questions on standards the interviewee is likely to know about. For example, with respect to questions about accuracy and timeliness of advising, candidates and completers could reveal much, while the program administrator should be a primary respondent to questions on program design.

Use Data to Help Focus and Formulate Some Interview Questions

Several data sources are available and should be used by reviewers. These include survey responses to Commission surveys (program completers, cooperating teachers, employers), Annual Data System (ADS) data, performance assessment data, and local assessment data. Reviewers should use information from these data sources to develop interview questions. Questions can be developed that help confirm or refute where data may indicate there are strengths and where there may be areas for improvement in the programs.

Avoid Questions That Can Be Answered "Yes" or "No"

Some simple factual questions may need to be asked. However, "Yes/No" questions generally receive a one-word response. To the extent possible, word questions in a way that invites respondents to describe their experience with the issue being reviewed. For example, an interviewer could ask candidates, "How was your field/clinical placement arranged?" rather than "Did you make the arrangements for your field/clinical placement?"

Pursue Questions Until They Are Answered

Reviewers should listen to the answer and decide whether they gained the information they are seeking. If not, they have a responsibility to pursue the matter further unless it is clear that the person does not have the information being sought. Some answers will need clarification or require elaboration. Reviewers should ask for specific examples or situations. Follow-up questions should focus on clarifying, amplifying, or verifying initial responses. Remember that not all interviews will yield the same amount of information, as some interviewees have more knowledge of an institution or its programs than others.

Do Not Accept Unsupported Conclusions

Be sure that sufficient information is gathered to substantiate any conclusions. Sources of evidence are critical and should be referenced and substantiated in the team report.

Follow Professional Insights and Look for Evidence to Confirm

Most site team members have a great deal of experience with educational institutions and have excellent insight about how institutions function. While these perceptions alone are not evidence, site teams should not ignore them during the data collection phase or

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even when making judgments. Insights can lead to confirming interviews and can help to sharpen the entire process.

Be Aware of Time - Adhere to a Time Schedule
It is up to each team member to control the time allotted for interviews. Interviews are generally scheduled for no less than approximately 30 minutes, with larger groups needing up to 45 minutes to an hour. Best practice, for site visits that are conducted virtually, is that interviews will need approximately 45 minutes and should not exceed 20 people. Team members should try to keep the interviews within the allotted time frame. It is important that all team members honor the schedule prepared by the institution as it represents many hours of work and many individuals have made special arrangements to be present and interviewed. If there is a need to eliminate or rearrange some interviews, be sure to discuss this with the team lead and state consultant. Under no circumstances should a team member unilaterally cancel an interview. In all cases, the cancellation of interviews needs to be done with caution and after discussion with the team lead and State consultant who will then inform the institution.

Ask a Summary Question
Some interviewees will have thought about their interview in advance and may have issues they want to mention. Invite them to do so at the end of the interview to ensure they have provided all the information they can. For example, "Is there anything that I haven't asked that you would like to share?"

Cross-Check Information
It is necessary to get information from a variety of sources, such as current candidates, cooperating teachers, public school administrators, student teaching supervisors, mentor teachers, program completers, and employers of completers and then cross-check the validity of the information. This is part of the triangulation strategy discussed below.

Relate Non-Specific Comments to Specific Standards
Answers are sometimes general and experiential rather than factual. Verify that the answer relates to specific program standards. Avoid accepting hearsay statements or comments that are overly vague. Remember that some interviewees will have an "axe to grind." Do not allow individuals with personal issues to consume valuable reviewer time. While it might be difficult during a site visit to distinguish between those with an "axe to grind" and those with legitimate concerns about a program, a reviewer must consider individual comments during an interview session in context with the totality of the evidence they are reviewing and with information reported by other team members.

Use Stimulated Recall
A good technique for improving responses is to provide a context within a program that interviewees are familiar with and ask questions related to that context. For example, use the program's handbook with interviewees and ask questions related to its contents. Another example is to ask the person to remember a particular time in the program (e.g.,

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beginning clinical practice) to sharpen their responses and enable them to be specific about how the program works.

Ensure Adequate Representation from All Programs

Interviewing groups can present particular challenges not found in interviews with individuals. One challenge is ensuring that representatives from every program, pathway, or satellite campus/location have the opportunity to respond to questions on every issue of importance. One method for dealing with interviewees who are dominating the group interview is to acknowledge their contribution and invite others to respond to the same prompt. For example: "I just heard about some single subject candidates' experiences in finding student teaching positions. What is the experience like for candidates in other programs?" Another method is to invite quiet individuals to speak. The interviewer might say: "I've heard from field supervisors from the administrative services credential and school nursing programs but haven't heard anything from field supervisors in school counseling. Can you please tell me what your experiences have been like working with school counseling candidates?"

Decision Making Considerations

No individual reviewer is expected to collect and analyze data for every piece of the puzzle. Team members should ask each other what they saw, heard, and read. Are they hearing the same general things? Did someone obtain information that is valuable to another member's area of responsibility? In most cases, team members can either confirm they are seeing and hearing similar things about the institution and its programs or they can provide information to fill in the blanks where other members are lacking information.

Look for Patterns/Themes

By the mid-point of the site visit, team members will have listened to numerous interviews, reviewed many documents, and talked with other team members about their interviews and document notes. They will probably have identified some possible patterns or themes. The team lead will provide opportunities for members to describe what they are thinking. Other members can provide supporting or conflicting evidence. Questions like these can help identify patterns: "What were the most common problems mentioned?" "What phrases or words were used across most interviews?"

Organize Responses by Constituency or by Standard

As team members review information obtained from each constituency, the reviewers should ask whether common concerns, strengths, or weaknesses were identified. The reviewer might rank the concerns, strengths, or weaknesses by the frequency of responses to get a measure of the "weight" of such issues. Alternatively, they might want to look at each standard to see how responses cluster.

Build a Logical Chain of Evidence

Team members often find that individuals from different programs independently report similar concerns or problems. The challenge to the team is to determine whether the

issues reflect program findings or whether they reflect an institution-wide problem that should be registered as a Common Standard finding.

For example, at one institution, candidates, program completers, and cooperating teachers representing multiple programs reported during interviews that candidates were often confused about what should be happening during field experiences and clinical practice. One team member verified those claims through a review of the course syllabi, which failed to reveal any evidence that field experiences were organized into a planned sequence of experiences to help candidates develop and demonstrate knowledge and skills (Common Standard 3). In discussions with other team members, the members acknowledged that some candidates and program completers had indicated that they felt supported during field experiences and were confident about their abilities to function effectively in a classroom (an example of conflicting evidence). The site visit documentation indicated that these experiences were incorporated into several courses, but it was difficult to find clear evidence that sufficient planning had been done to ensure the field experiences were appropriately sequenced and that candidates were able to incorporate material from courses into their field experiences. Faculty interviews revealed that each faculty member thought others were focusing on this topic.

This is an example of a logical, verifiable relationship. If field experience and clinical practice turned up in interviews as a weakness across multiple programs, one would expect to find little attention paid to it in the formal curriculum. In the above example, this appears to be the case. Therefore, the preponderance of evidence indicates that Common Standard Three is either Met with Concerns or Not Met. If these concerns arise only in one program, the team would need to determine whether the issue rises to the level of a Common Standard finding of Not Met or Met with Concerns. A number of factors would all contribute to the team's deliberation no this issues, including the seriousness and pervasiveness of the issue as well as any programs offered by the institution for which it is not an issue.

Triangulate and Avoid Bias
When the team has similar information from different sources about how an institution is implementing a standard, it is easier to come to consensus about the findings. Repeated evidence from believable sources helps the team make its decisions. Avoid over-emphasizing testimony from a small number of influential respondents. Avoid campus politics – something that is inevitable even in the most positive work environment. Team members must be diligent not to impose their own values and beliefs about how educator preparation programs "should" operate; rather, the focus should be on the data collection and analysis performed for the accreditation site visit. It can be helpful to look carefully at extreme cases where people who are the most involved with the institution reveal contrary data. This can be powerful information if it is not tainted by ulterior motives.

Writing the Team Report

The site visit report informs 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. The report should generally follow the templates provided by staff and include details about the institution and the programs to ensure that the COA understands the way the program is operated. The report must also include the team's rationale for its decisions and accreditation recommendation.

Findings should be supported by evidence collected by the team during the visit, included some data to help substantiate the findings, and the narrative of the report should not contradict the findings on the standards. The report should also contain examples of practices at the institution, anonymous information shared from site visit interviews, and references to data from the Accreditation Data Dashboards that support the team's findings. The team lead and consultant will edit the final draft of all report sections for clarity, coherence, and uniformity.