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 volunteer group of individuals from K-12 and higher education with experience and expertise in education and educator preparation. It is composed of educators, administrators, practitioners, and others 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. This work is done both in preparation for and during accreditation site visits.

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 a demonstration of basic requisite skills necessary for accreditation. During BIR training, prospective members participate in activities designed to further develop skills required during an accreditation site visit. Once accepted, BIR members assigned to a site visit are expected to apply the skills outlined in this chapter during an accreditation site visit and, if necessary, request assistance or guidance from the team lead and/or the Commission staff 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
- 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 programs, review available data about the program, interview individuals who are knowledgeable about specific educator preparation programs during accreditation site visits, and determine the extent to which an education unit or its programs are aligned to Commission-adopted standards. Regarding 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 (see Chapter Six). Alternatively, a BIR member may be assigned as part of a team to complete an accreditation site visit (see Chapter Ten). Site visits utilize the full array of BIR members' 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 as approved program sponsors apply to offer a new program. Institutions submit required documentation and exhibits for the prospective credential program. Assigned reviewers assess the proposal and must agree whether there is sufficient evidence contained in the submission to find each program standard is met. If not, the reviewers must identify the nature of the information that is not addressed or is not documented, and that feedback is given to the institution. The Institution then revises the program proposal and resubmits with additional documentation. These revisions are then assessed, often by the same reviewers, and another determination is made as to whether each standard has been met. When all adopted program standards are met, the program proposal is 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 instrumental in the Program Review and Common Standards review process (see Chapter Six) which occurs in the fifth year of the accreditation cycle. Participating in Program Review requires reading and analyzing institutional submissions which include brief program narratives, course syllabi, assessments, and other required documentation. When the assigned BIR 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 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 accreditation site visit for review by the accreditation site visit team.

During the fifth year of the accreditation cycle, responses to 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 prepares an addendum for the accreditation site visit team. 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 last 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 review evidence submitted on the institution's accreditation website which includes, but is not limited to the following items:

1. Responses to Preconditions for each approved educator preparation program (staff reviews preconditions initially, but issues may arise during site visits that require BIR members to review further).
2. Responses to Common Standards, Common Standards Preliminary Report of Findings, and an Addendum to the Common Standards Preliminary Report of Findings 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 Annual Data Dashboard since the last site visit
5. Any additional information provided by the institution and its programs on its accreditation website.

The purpose of the accreditation site visit is for the BIR team to make decisions on each of the Common Standards and program standards, for all approved programs. Soon after the team convenes at the site, team members share their understandings and any concerns about each educator preparation program and about the institution's education unit. Throughout the site visit, every team member utilizes a wide variety of skills in carrying out their role to ensure the institution receives a fair, impartial, and thorough review of its overall functioning and the functioning of each individual educator preparation program.

III. BIR Member Tasks and Skills

In order to effectively and efficiently complete the responsibilities identified above, every BIR member must be skilled in 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 tasks are included in each Commission accreditation activity.

BIR Member Tasks	**Initial Program Review**	**Program Review**	**Common Standards Response**	**Site Visit**
Reading and Analyzing Documents	Yes	Yes	Yes	Yes
Interviewing constituents during the site visit				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

BIR Member Tasks	Initial Program Review	Program Review	Common Standards Response	Site Visit
Writing assigned sections of the Accreditation Report				Yes

Reading and Analyzing Documents

Responses to both Program Review and the Common Standards require the submission of specific evidence rather than lengthy narratives. Therefore, the initial task facing BIR members in all accreditation assignments is reading and analyzing specific documentation. Below are some techniques 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 accreditation site visit team's task is to ensure 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 means to this common end will vary from institution to institution. Accreditation site visit team members are aware that these variances are permissible and to be expected.

Identify Whether All Required Documentation is Present

Programs are required to submit key pieces of evidence as prescribed (Program Review or Common Standards review) throughout the accreditation cycle. These requirements eliminate the need for lengthy narratives. To determine whether the institution or program meets the relevant standards, it is important to first identify that all required evidence has been submitted.

Determine Relationships

Programs are required to submit an organizational chart or other graphic representation of the reporting relationships of program personnel, including their relationships within the greater 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 will thoroughly review the content of all submitted evidence. While the Commission encourages institutions to submit well organized and easily navigable evidence, accreditation site visit team members will 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 submitted content, reviewers will not assume it is present. Rather, reviewers will request clarification and/or additional evidence from the institution. Reviewers will base their decisions on what they are 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 will consider what important information may be lacking. Reviewer familiarity with the credential area is important in identifying what information may be lacking. Noted omissions will 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.

Follow the Candidate
One way to understand a program clearly is to view the program from the perspective of a candidate. 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 will 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 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. During the site visit, evidence cited in any of the Program Review reports should be available for the accreditation site visit team to review. If the site visit 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 Commission staff consultant will be informed during site visit team debriefings. If needed, that information will be included in the mid-visit report. It is critical that reviewers, during Program Review, Common Standards Review, and the site visit, examine documentation to ensure all claims are accurate and evidence based.

Describe What Documentation Must be Reviewed at the Site Visit (Common Standards and Program Review Only)
If, during the Program Review process, program documents provide an adequate description about how the institution responds to a standard, and the description is supported by submitted evidence, 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 submissions do not provide adequate evidence that a standard is preliminarily aligned, the relevant accreditation site visit reviewer(s) will seek additional information regarding alignment. In many cases, the program reviewer and Common Standards reviewer will identify the types of evidence the site visit reviewer should examine during the accreditation site visit.

Site Visit Interviews
Interviews with a sufficient number of individuals with direct knowledge of the institution or program is a critical aspect of determining institutional and program quality and effectiveness. The institution shoulders the responsibility for ensuring that a sufficient number of interviewees are available for each team member (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). Site visit team members interview these constituencies carefully about their experiences with the institution and the program in relation to the standards. The site visit team member must feel confident that they have interviewed a broad spectrum of constituencies – across all programs, pathways, delivery models and campus locations/service area - to reach decisions about standards findings.

If, during the Program Review process, the reviewer preliminarily determines the program is not aligned with significant parts of standards, or whole standards, the Administrator of Accreditation may add a member to the accreditation 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 site visit team member may 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 site visit team to gather information from “samples” of individuals rather than from multiple members of a particular type for each program. Some interviews will be scheduled with single individuals (e.g., department chairperson). The team lead and Commission staff consultant will clarify the interview responsibilities of each site visit team member.

Reviewers will prepare interview question questions for specific constituency groups based on site visit team discussions. Depending on the initial responses to a question, follow-up questions may vary significantly.

The purpose of interviews at an accreditation site visit is to obtain specific information that allows reviewers to determine whether the institution and its programs are meeting Commission adopted standards. The information that follows is intended to help team members improve their interviewing skills and effectively complete their review tasks.

Introductory Comments and Setting the Tone
Interviews begin with brief introductions that include the accreditation site visit 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 process, but rather a regular review process to ensure quality and to make recommendations for improvement, if necessary.

During the site visit, team members do not represent their own institutions. 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

Site visit team members will explain the purpose of the interview and the types of questions that will be asked. The questions will vary depending on the constituency being interviewed. Questions will be geared toward what that constituency would likely know, understand, and experience in the program. For instance, when interviewing cooperating teachers, site visit team members may introduce themselves 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. Site visit team members should be gracious and ease into the questions by first asking some general questions. It might also reduce the interviewees' anxiety to know their comments will be kept confidential and findings will be reported in the aggregate so no particular comment can be traced back to an individual.

Assure Confidentiality

Site visit team members will inform interviewees that any information shared will be kept strictly confidential and only aggregate data will be reported to the institution. This is particularly important with candidates currently in the program and program faculty.

Maintain a Professional Perspective

Team members will 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 always as objective as possible and 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 site visit team confirm in interviews they have heard and correctly understood comments made by interviewees. Interviewers can do this by paraphrasing back to the interviewee the main idea contained in the interviewee's comment. This practice encourages interviewees to clarify something the interviewer had not understood correctly or to elaborate on their previous response.

Take Notes

Site visit team members will take careful notes during interviews. This becomes particularly important when conflicting responses are received by other team members. Team members frequently consult their notes during deliberations because, by then, each 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. Site visit team members will also make note of similar responses on specific items to identify patterns of evidence on a particular standard.

Ask Questions Related to Standards

It is important to ask questions that will help the team determine whether specific standards are met. Sometimes, it is helpful to use the language of the standard to craft interview questions while other times it may be necessary to ask a question that gets at the standards without necessarily using the complex language of the standard. Team members focus their questions on the aspects of the standards each interviewee group 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

Accreditation site visit team members will use several available data sources to develop questions. These sources include survey responses to Commission surveys (program completers, cooperating teachers, employers), Annual Data System (ADS) data, performance assessment data, and local assessment data. Questions which stem from data can be developed to help confirm or refute strengths and areas for improvement identified in other sources of evidence.

Use Open-ended Questions, Whenever Possible

While some simple factual questions may need to be asked, "Yes/No" questions generally receive a one-word response. To the extent possible, questions will be worded in a way that invites interviewees to describe their experiences. 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

Site visit team members will listen to the interviewees' answers and decide whether they have sufficient information. Some answers will need clarification or require elaboration If not, interviewers have a responsibility to pursue the matter further unless it is clear the person does not have the information being sought. Follow-up questions should focus on clarifying, amplifying, or verifying initial responses; this may be done by asking for specific examples or situations. 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

Interviews will help site visit team members gather sufficient information to substantiate any conclusions. All sources of evidence are critical and should be referenced in the site visit team report.

Follow Professional Insights and Look for Evidence to Confirm

Most accreditation site team members have a great deal of general experience with educational institutions and have excellent insight into how institutions function. While these perceptions alone are not evidence, site teams should not ignore them during the data collection phase or even when making judgments. Insights can lead to confirming interviews and can help to sharpen the entire process. Accreditation site team members should never, however, compare the program or institution being reviewed with their own.

Adhere to a Time Schedule

It is up to each accreditation site visit team member to control the time allotted for interviews. Interviews are generally scheduled for no less than 30 minutes, with larger groups needing up to 45 minutes to an hour. Best practice for interviews conducted through technology is that interviews last approximately 45 minutes and not exceed 20 people. Site visit 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 large numbers of individuals have made special arrangements to be present at interviews. If there is a need to eliminate or rearrange an interview, site visit team members will discuss this with the team lead and Commission staff consultant. Under no circumstances should a site visit team member unilaterally cancel an interview. In all cases, the cancellation of interviews will be done with caution and only after discussion with the team lead and Commission staff 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 cross-check information from a variety of sources. For example, information gleaned from interviews with current candidates can be checked against (triangulated with) information from mentor teachers and Accreditation Data System surveys.

Relate Non-Specific Comments to Specific Standards

Answers to interview questions are often general and experiential rather than factual. Site visit team interviewers will verify that answers relate to specific program standards and avoid accepting hearsay statements or comments that are overly vague. Interviewers should be aware some interviewees may have had negative experiences with a program that may impact their responses and will facilitate the interview so personal issues do not consume valuable interview time. While it might be difficult during a site visit to determine who has a legitimate concern about a program, site visit team members will consider individual comments during an interview session in context with the totality of the evidence they are reviewing from other sources and with information reported by other team members.

Use Stimulated Recall

Stimulated recall involves providing a context with which interviewees will be familiar and asking questions associated with that context. For example, use the program's handbook with interviewees and ask questions related to its contents. Another example is to ask interviewees to remember a particular time in the program (e.g., beginning clinical practice) to focus 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. If some interviewees are not responding or are dominating the conversation, the interviewer should employ strategies to hear from those individuals. One approach is to acknowledge dominant speakers' 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 by asking for someone in their role for additional input, rather than calling on specific individuals. 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 and should feel confident that they can rely on their team members to fill in any missing information. During site visit team discussions, team members will 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 accreditation 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 have identified possible patterns or themes. The team lead will provide opportunities for members to describe what they are thinking so other team 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 site visit team members review information obtained from each constituency, team members will ask whether common concerns, strengths, or weaknesses were identified and then 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

Site visit team members often find 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.

Example Scenario: 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 evidence that field experiences were organized into a planned sequence of experiences to help candidates develop and demonstrate knowledge and skills. During site visit team discussion, other 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). Additionally, site visit documentation indicated these experiences were incorporated into several courses, but it was difficult to find clear evidence 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 site visit team will 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 will contribute to the team's deliberation on this issue, including the seriousness and pervasiveness of the issue as well as any programs offered by the institution for which it is not an issue.

Triangulation of Data

When the accreditation site visit 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 credible sources helps the team make its decisions.

Avoid Bias or Perceptions of Bias

Accreditation site team member bias must be avoided at all times. Fundamental to the accreditation system is a belief that the process is fair. If the institution or program personnel believe that there has been actual or perceived bias by site visit team members, it can be devastating to the credibility of the findings. Site visit team members must be diligent about not imposing their own values and beliefs about how educator preparation programs "should" operate; rather, the focus should be on the standards that are required and how the evidence demonstrates whether the institution under review meet the standards. Site visit team members should never refer to how their own program may be operating even if these comments are meant to provide helpful to the institution.

Consider Context

Site visit team members need to use common sense when considering the context around information gathered. Certain situations outside of the scope of the Commission's accreditation system and credentialing programs may impact responses that the team members hear at a site visit. For instance, campus politics can sometimes influence what reviewers hear from interviewees. Site team members must consider whether what was shared has direct relevancy to the program that is being reviewed. The Commission staff consultant will attempt to stay cognizant of any issues that may impact the site visit team or its activities. Focusing on the purpose of the accreditation site visit and determining alignment to Commission-adopted standards is primary.

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 supports the COA in rendering an accreditation decision. The report must follow the templates provided by Commission staff consultant and include details about the institution and its programs to ensure the COA understands how each program is operated.

The report will include the site visit team's rationale for its decisions and accreditation recommendation. Findings will be supported by evidence reviewed and analyzed before and during the accreditation site visit. The accompanying narrative will align with the findings and not provide contradictory information. The report will also contain examples of practices at the institution, anonymous information shared from site visit interviews, and references to data from the Accreditation Data Dashboards all of which support the team's findings. The team lead and Commission staff consultant will edit the final draft of all report sections for clarity, coherence, and uniformity.