Chapter Seven
Preparation for an Accreditation Site Visit

Introduction

This chapter provides information for institutions preparing for an accreditation site visit and is intended as a guide for those who are charged with coordinating the administrative tasks of that site visit. Included is information on the procedures, activities, and decisions that precede the accreditation site visit. Additionally, the responsibilities of the Commission staff consultant assigned to the institution are detailed. For information about the accreditation team, see Chapter 10.

I. Scheduling an Accreditation Visit

Accreditation visits occur during the sixth year of the accreditation cycle. The Committee on Accreditation (COA) retains the right to schedule more frequent site visits as a stipulation of institutional accreditation or based on reviews of annual data submissions, preconditions, Program Review, or Common Standards review. The COA may also schedule an accreditation visit if the institution has not cooperated with the established accreditation deadlines and submission dates or if information has been brought forward that raises concerns about whether the institution is operating Commission-approved programs in alignment with statutes, requirements, and/or standards.

Institutions will be asked in year five of the accreditation cycle to choose from a selection of possible site visit dates provided by Commission staff. Institutions should consider following best practices in choosing accreditation site visit dates.

- Institutions should select a time period when candidates are on campus, student teachers are in classrooms, and all relevant constituency groups (e.g., candidates, completers, mentors/coaches, and partners) will be available.

- Institutions should avoid local school holidays, testing schedules (when possible), major academic conferences, and/or other times that will draw faculty/teachers away from campus or otherwise impede collection of information from candidates, completers, employers, and/or community members.

- When considering Start Days (Other schedules may be permitted if feasible, but they must be requested early in the process by the institution.)
    1. For institutions of higher education, the most common in-person site visit schedules begin on Sunday with team members arriving by noon and beginning their work mid-afternoon.
    2. For PK-12 institutions, in-person site visit schedules most often begin on Monday with team members arriving in the morning and beginning their work.

3. Virtual site visits, when permitted, have more flexibility in starting times but follow the in-person schedule for starting days.

- Institutions with multiple sites, unconventional class schedules, or other unique circumstances should make these variations known early in the planning process.
- If an institution is seeking national accreditation in addition to Commission accreditation, site visit scheduling must be coordinated with the national accrediting body in accordance with the Commission's agreements with these bodies. In these situations, early planning must be initiated.

The Administrator of Accreditation will confirm site visit dates and assign a Commission staff consultant eight to twelve months prior to the site visit.

II. Support Prior to the Visit

One Year Out Visit

The assigned consultant will contact the institution for an introduction and to schedule an initial meeting, often referred to as a "year out visit" to provide an overview of the accreditation site visit process. The institution may invite anyone it chooses to attend this meeting, although it is expected that those with leadership positions for the programs as well as day-to-day interactions with the unit and its programs will be in attendance. Those individuals who will have a role in preparing the institution for the visit should also be in attendance.

Logistical and Budgeting Arrangements

For in-person accreditation visits, the Commission is responsible for all direct expenses of the accreditation site visit team, including travel expenses, lodging, meals, and per diem. The Commission is also responsible for the direct expenses incurred by the team lead and the consultant in working with the institution in preparation for the accreditation site visit and, if requested, the cost of substitute teachers that may be needed for team members who are classroom teachers. The institution is also responsible for identifying, in consultation with the Commission's travel team, an acceptable hotel in close proximity to the campus, arranging for meals for the team, as well as parking permits or other forms of transportation for team members during the visit.

The Commission will initiate a contract with the institution through which the lodging and meal expenses of team members will be paid at the rates established by the State of California. Only breakfast, lunch, and dinner are allowable meal expenses.

The institution is responsible for covering the costs of assigned time to its faculty and staff for the development of reports or documents and collection of required data. Please note that the site visit process does not include a "reception" or "event" sponsored by the hosting institution.

Institutions seeking national accreditation assume all costs for that process with the exception of any reviewers appointed by the Commission in accordance with the agreements and protocols established with these bodies. This is also true if the institution elects to have one or more of its credential programs accredited by a national professional association.

For in-person accreditation site visits, the institution is responsible for providing the team with the following:

- A team workroom at the institution site and at the hotel that is secure, accessible only to the team, and appropriately sized for the team
- Space for all team members to conduct interviews
- Access to a printer at the institution site and hotel site
- Access to telephones/technology in a confidential setting for team members required to conduct virtual interviews, if needed
- Access to wi-fi at the institution site and hotel site

When accreditation site visits are permitted, the institution is responsible for providing the team with the following:

- Technology platform to conduct interviews and maintain contact with site representatives
- Access to an IT contact at all times during the visit for assistance with technical issues
- Clear lists of individuals participating in each interview with roles indicated.

The institution is responsible for preparing all necessary documents for the site visit, establishing an accreditation website accessible by team members, providing required data, and any other materials deemed useful to the team by the institution or as requested by the team.

For in-person site visits, the institution is also responsible for working with the Commission staff consultant to make all necessary arrangements regarding the interview schedule. The institution is responsible for scheduling all interviews for the institution and all its programs, scheduling the rooms on campus that will be used for the interviews, providing parking for interviewees, ensuring interviewees reach the appropriate interview location, and arranging back-up interviews as needed. When necessary, institutions are encouraged to propose innovative arrangements for handling interviews (e.g., virtual interviews or dispersed interview sites) and are required to ensure sufficient numbers of interviews are scheduled across all key groups. For larger campuses, when programs are spread across campus in different locations, accompanying the reviewer to the correct location may also be necessary.

For virtual site visits (when they are permitted), the institution is also responsible for scheduling interviews for the institution and all its programs, setting up the virtual meeting rooms, providing technical support for the meeting technology platform to both the team and the interviewees as necessary, ensuring interviewees have the relevant time and links for their interviews, and arranging back-up interviews as needed. When necessary, institutions are encouraged to propose innovative arrangements for handling interviews (interview candidates during scheduled class times, interview administration during regularly scheduled meetings) and are required to ensure sufficient numbers of interviews are scheduled across all key groups.

III. Preparation for a Site Visit

The accreditation site visit team relies on a comprehensive process of evidence collection and evaluation and interviews to make decisions regarding an institution's alignment to the standards and make an accreditation recommendation to the COA. This includes the following:

1. Annual Data Submission

Submitted in each year of the accreditation cycle, this data provides information about the institution and its programs such as the number of candidates and completers, demographics, delivery models, locations, and other unique features of the institution/program sponsor. It also includes specific outcome measures such as survey data and pass rates on examinations. The Commission provides specifics about what data must be submitted and the definitions for that data. All Commission-approved institutions must comply with all required data submissions in order to maintain ongoing accreditation.

2. Preconditions Report

Program sponsors will prepare a response to Preconditions and submit it to the Commission during years one and four of the accreditation cycle. Submissions provide current information about institutional and program compliance with the Preconditions. The institution must respond to Commission adopted General Preconditions and program specific Preconditions for all credential programs offered by the institution. The Preconditions and related Evidence Guidance Documents where available may be found on the Precondition web page.

3. Program Review and Common Standards Review Submissions, Feedback, and Addendum

The Program Review and Common Standards Review submissions are due in the year prior to the accreditation site visit (Year Five) and provide documentation demonstrating how the institution and its programs are addressing the standards. Feedback is provided to the institution and programs who will develop addendum responses that must be made available to the site visit team. For information about Program Review, please refer to Chapter 6 of this handbook or to the Commission's Program Review webpage. For information about Common Standards Review, please refer to Chapter 4 of this handbook or to the Commission's Common Standards Review webpage.

4. Institution Accreditation Website

Institutions with an accreditation site visit must post all information on an accreditation website and make the website available to the site visit team. Material and artifacts that cannot be posted electronically, such as candidate files, should be available to the team in some other fashion that ensures the security of these files. Institutions should discuss the appropriate manner of doing so with the Commission staff consultant and team lead. Institutions planning to use multi-media presentations should make this known early in the planning process. No less than 60 days before the visit, the institution must post all relevant materials, including but not limited to responses to Program Review and Common Standards feedback as addendums on the accreditation web page and provide access to the site visit team. Once the team has access to the accreditation web page no additional changes, modifications, or edits should be made to the page without first consulting the Commission staff consultant and team lead.

5. Scheduling Interviews

The institution is responsible for setting up the interview schedule for the site visit team. Interview schedules should be developed in consultation with the Commission staff consultant. Since the time available to the site visit team is limited and COA policy dictates that sufficient numbers of individuals from all constituent groups be interviewed, creating a workable interview schedule is a critical task for the institution and should receive as much attention as does document preparation for the site visit. In addition to ensuring sufficient numbers of critical constituents, interview schedules must also include adequate breaks for team members to examine documents and other evidence, organize notes from interviews, and check in with the team lead and Commission staff consultant throughout the day.

Whether an accreditation site visit is in-person or virtual, it is very important that interviews occur in a secure and private environment. Interviewees who believe their comments might be overheard by others may be less willing to identify concerns or problems they are experiencing in the program.

Who Should be Scheduled for Interviews by the Team

Accreditation site visit team members must have the opportunity to interview a wide variety of constituencies who can shed light on the quality of the programs offered by the institution. These will include persons involved in the development and coordination of all approved programs and the preparation of candidates, program participants, as well as other constituency groups, as discussed further below.

A list of persons who are typically scheduled for interviews is noted below. This list may not include all pertinent constituents for a particular institution or program. Institutions should work closely with their Commission staff consultant to ensure all necessary individuals are included in the interview schedule.

Candidates

- Beginning candidates (very small number)
- Middle of program candidates (larger number than beginning candidates)
- Candidates who are nearing completion, especially those in student teaching and/or field experiences (majority of candidates interviewed)
- Candidates enrolled in the various pathways to each credential that the program offers

Mentor Teachers/Master Teachers/Clinical Supervisors/Support Providers

- Currently working with candidates or have worked with a candidate in the past two to three years

Administrators

- School sites where candidates are placed, and/or assist with fieldwork placements
- School sites where placements are routinely made or where program participants are currently working
- If the program works with multiple school districts, representation from a broad spectrum of districts is required

Program Completers

- Completers from the two previous years
- If most program completers leave the area, it may be necessary to go back one more year to ensure that a sufficient number of interviews are conducted
- Completers from many years ago should not be included as the team's charge is to review the current program implementation.

Employers of Program Completers

- School district personnel office administrators
- School site principals

Administration and Faculty of the Institution

- President/Chancellor (optional unless joint or concurrent national accreditation visit, then CTC defers to their requirements and protocols)
- Provost/Superintendent
- Academic vice-president/deputy superintendent
- Chief Financial Officer of institution
- Dean of the college or school of education/department director
- Chairs of the involved departments
- Program coordinators of each credential program
- Field supervisors in each credential program
- Professors/instructors from each credential program (full-time and part-time)
- Credential analyst
- Advisory committees for credential programs

Partner Organizations

- Any PK-12 district, school, or institution of higher education partners that provide advice and/or oversight of the programs
- Any community organizations that play an important role in the program
- Relevant vendors or contractors that provide instructional or other educational services for the program

Institutions with satellite campuses or locations in addition to a main campus must ensure that a representative sample of each category of constituency at each satellite campus is scheduled for interviews. Accreditation site visit teams cannot, with confidence, develop program findings or accreditation recommendations if they have not interviewed enough constituents from all aspects and locations of the program. The responsibility rests with the institution to anticipate the need for adequate interviews with off-campus constituencies. If the institution has concerns about off-campus interviews, it must work with the Commission staff consultant to address these concerns. Only in rare instances and only when warranted will site visit teams travel to other locations to conduct interviews.

The number of interviewees will vary by category and program, and will depend upon program size, relative "importance" to the credential preparation program, and location of the interviewees. For a small credential program, nearly everyone associated with the program will be interviewed. Specific problems or concerns with interview sample size must be discussed well in advance of the site visit with the team lead and the Commission staff consultant.

Selection of Interviewees

The institution should begin assembling lists of potential interviewees as early as one year before the visit. The names of current candidates and recent completers should be assembled as soon as practical in the months prior to the visit. Faculty who teach or provide services in the program should be notified of site visit dates as soon as possible to ensure their availability. Consideration should be given to ensure sufficient participation of part-time or adjunct faculty, faculty who are on sabbatical leave, or other key personnel who might not otherwise be present at the time of the visit.

As a guide, candidates and program completers may be interviewed in groups of approximately 8-20 individuals. Faculty and field supervisors may be interviewed in groups of approximately 3-10 individuals, school district site administrators may be interviewed in groups of approximately 3-10 individuals, and institution leadership should be interviewed individually. It is important to note that no individual with supervisory or oversite responsibilities of a particular constituent group should be included in the same interview as that constituent group. This principle should hold even if one serves in multiple roles. For instance, a program director that also serves as a field supervisor, should not participate in the interview with field supervisors since they like have authority over the other field supervisors as the program director. Individual interviews may need to be scheduled for these individuals. Telephone interviews, videoconferencing, and other means of conducting the interviews are useful when travel is difficult or where program completers or other constituents work at significant distances from the campus.

Review of Interview Schedules by Team Lead

A nearly finalized interview schedule must be available no later than the Two-Month Out Pre-Visit, and the interview schedule should be finalized approximately four weeks before a site visit. When the schedule is complete, it is sent to the Commission staff consultant and the team lead for their final review.

Failure to have an interview schedule prepared well in advance of the site visit may likely result in the site visit team not being able to gather all the relevant information needed to make decisions on standards and an accreditation recommendation that reflects the institution’s true alignment to standards. Institutions are strongly urged to avoid this problem. Once any changes are made by the team lead, the schedule will be followed as amended. Late additions to the schedule, if needed, must be clearly noted and communicated to the Commission staff consultant and team lead.

Additional Notes on Creating an Interview Schedule
Interview schedules should be clear and easy for accreditation site visit teams to follow. Having specific columns for each reviewer with rows for designated times, names and titles of interviewees, and location or links to the technology platform used, will minimize confusion and ensure that the team members will be able to focus on the content of the conversation. Consultants may be able to provide examples to institutional personnel to assist them in conceptualizing the interview schedule. Whenever possible, the scheduler should be cognizant of teaching and travel schedules. Programs with heavy afternoon and evening classes will need to work with the Commission staff consultant to balance the time commitments of the site visit team. Scheduling interviews during the late afternoon of the first full day will be critical for campuses with evening classes.

Institutions should avoid lengthy introductions which delay the onset of the interviews. The interview schedule must allow sufficient time during each day for document review and site visit team meetings. Interviews should not be scheduled after 6:00 p.m. without agreement from both the team lead and Commission staff consultant.

Institutions are encouraged to not only “invite” interviewees, but to take steps to ensure they will attend. Confirmation calls or emails in the days just prior to the visit are strongly advised. Schedulers are urged to over book the number of interviewees to account for individuals who may not make the interview. Scheduling one constituency (e.g., program completers) only once should be avoided as it will not give team members any opportunity to follow-up on comments or new information that may come out in an interview session.

For in-person site visits, schedulers should consider the institution’s technology spaces such as “smart” classrooms or conference rooms where interviews with off-campus constituents can be held or consider ways to entice these individuals to make the journey to campus. The institution may also wish to combine an alumni event, professional development offering, or some special activity with group interviews to encourage candidates, program completers, master teachers, and district-employed supervisors to come to the campus. A final suggestion is to have someone at the institution available to make stand-by calls for the team lead and Commission staff consultant to individuals who could be interviewed by telephone.

Given the importance of the interview process to the site visit team’s accreditation recommendation and the complexities of ensuring sufficient representation and participation in interviews, it is important that institutional planning teams begin early to develop plans for handling this element of the accreditation site visit.

IV. The Accreditation Site Team Daily Schedule

The length of each accreditation site visit will depend on a number of factors including the number and size of the programs, enrollment, and the results of the Program Review and Common Standards review processes. Generally, the length of a visit for larger institutions with many programs will be four days, while smaller institutions with one or two programs could be three days in length. The information presented below is provided as general guidelines regarding the length and structure of a typical accreditation visit. The Commission staff consultant will work with the institution and the team lead to ensure the appropriate number of days and structure for the visit will allow the site visit team to accomplish its objectives.

One or Two Weeks prior to site visit

Interviews of program directors/coordinators may take place in the two weeks or so prior to the site visit. The purpose of these initial interviews is to make sure that the reviewer who is assigned to the specific program has an opportunity to ask clarifying questions about the program design and operations. It is critical that the site visit team member understands accurately the program design, roles and responsibilities of program staff, and other basic information about the program before interviewing constituencies about how well the program is being implemented. This initial interview of the program director by the site visit team member assigned to review that program may also be attended by the team lead and the Commission consultant.

Day One

The team arrives at its hotel site sometime before noon or, for virtual site visits, assembles in the virtual team room. Some examples of activities include:

- Team meeting
- Orientation
- Overview of institution and its programs*
- Document/evidence review
- Interviews

** The overview is an opportunity for the leadership to provide the site visit team with information and context specific to the institution and its programs. This overview may take place virtually in the weeks preceding the site visit.*

Day Two

The first full day of the accreditation site visit is devoted to interviews with representatives of all major interest groups (e.g., faculty, administration, candidates, program completers, employers, district-employed supervisors, program providers, advisory boards, cooperating school personnel, community members, etc.). In the evening, team discussions take place to determine any issues and to plan for the next day's activities.

Day Three

The second full day of the accreditation visit is similar to the first full day. The interview schedule must include time for a mid-visit meeting early in the morning to permit the team lead to let the representatives of the institution know if there are any

- areas where the site visit team is not finding alignment to the standards.
- requests for additional information pertaining to those standards.

If possible, interviews should conclude no later than 5:00 p.m. to ensure that the site visit team will have sufficient time for a meal break and its evening discussions.

Day Three evening

The evening of the second full day is set aside for discussion, team decision making, and report writing by the team so no other activities can be scheduled. During this time, individual site visit team members will report their findings about each program and the team will deliberate about its accreditation recommendation. The team may find it necessary to request last-minute clarifications or documentation during this time, so an institution representative should remain available. Once the team agrees on the Program and Common Standards findings and an accreditation recommendation, the team, team lead and Commission staff consultant will write their various portions of the Summary Report.

Day Four

On the morning of the fourth day, the site visit team continues to work toward completion of the accreditation report, finalizing findings and rationale statements, the team recommendation, and stipulations. All site team members should have opportunities to read, edit, and comment on the draft report such that it represents a consensus of the team. As soon as all edits are complete, the team lead and Commission staff consultant prepare to present a summary of the site visit team’s findings and accreditation recommendation to the institution. Other site visit team members are given the option to attend.

Exit Report

The institution may invite anyone to attend this presentation of the Summary Report which includes the findings on all standards, the rational statements for any standard that is not met or met with concerns, the accreditation recommendation, and any recommended stipulations. It does not contain the detailed narrative that is in the final report. Usually, the team lead and Commission staff consultant hold a private briefing with the dean or director prior to the formal exit report to provide a review of the report and answer any questions. During the formal exit report that includes institution representatives, as invited by the institution, the team lead and Commission staff consultant will not take questions.

Report to the COA

At the next appropriate, regularly scheduled COA meeting following the accreditation site visit, the team lead will make a presentation of the team's findings and accreditation recommendation to the COA. The institution may invite anyone to attend this presentation of the accreditation site visit team's report, however those presenting are limited to three. The

COA will make an accreditation determination after its deliberation at this public meeting where institutional personnel, the site visit team lead, and the Commission staff consultant are in attendance to respond to questions from the Committee about the report.

V. Important Considerations in Preparing for the Site Visit

According to the *Accreditation Framework*, the COA makes a single decision about the continuing accreditation of educator preparation at each Commission-approved institution including a decision about the specific programs an institution offers. Thus, the following important considerations need attention:

1. **Off-Campus Programs, Distance Learning Programs, Extended Education Programs, Consortiums, and Professional Development Centers** - Information about all sites where programs are offered must be a part of the planning for the accreditation visit and will be a part of the accreditation decision made about the institution. Interviews must be scheduled to represent participants at all sites. These interviews may be conducted via technology. In some cases, the team size may be increased to facilitate the gathering of data from multi-site institutions. It is expected that the Commission's standards are upheld at all sites where the programs of the institution are offered.

2. **Programs Offered Outside the School/Department of Education** - Even though a particular credential program may reside outside of the school/department of education at an institution, it is considered to be a part of the education unit. It will be included in the accreditation visit and affected by the single accreditation decision made about the institution. The education unit is responsible for ensuring program quality for all sponsored credential preparation programs.

3. **Special Circumstances** - As special circumstances arise, they will be handled on a case-by-case basis with the Administrator of Accreditation, team lead, and Commission staff consultant to ensure they are given proper consideration. If these special circumstances begin to arise more frequently, the COA will develop policies and procedures to address them.

VI. Accreditation Findings, Accreditation Recommendations, and Team Report

The accreditation report includes a statement about the team's accreditation recommendation, summary information about the standards findings, as well as summary information about the institution and its programs. The report is augmented by a COA agenda item that includes a table identifying each program, how many standards apply to the program, and how many of those standards were met, met with concerns, and not met. A similar table is included for the Common Standards.

Accreditation Team Recommendations

Once the site visit team reaches consensus about program and Common Standards findings, it deliberates on its accreditation recommendation. For a thorough discussion of possible accreditation recommendations and their operational implications, see Chapter 8 of this handbook. The team lead and Commission staff consultant will support the team as it determines whether the findings of the institution and its programs support a recommendation for *Accreditation* or whether the findings are substantive enough to warrant a recommendation of *Accreditation with Stipulations*, *Accreditation with Major Stipulations*, *Accreditation with Probationary Stipulations*, or *Denial of Accreditation*. All these possible options are described in further detail in Chapter 8.

VII. Activities after the Site Visit

Committee on Accreditation Actions

Following the accreditation site visit, the Commission staff consultant will assist the team lead in preparing the accreditation report for submission to the COA. In accordance with the Bagley-Keene Open Meeting Act, the COA's agendas are posted 10 days prior to the scheduled meeting. The accreditation team report is posted on the COA meeting webpage in advance of the scheduled meeting where the institution's report will be discussed. Committee members study the materials in advance of the meeting and are prepared to ask for clarification and to discuss their perspectives of the report and the findings. Questions posed by the COA may be directed at the institutional personnel, team lead, consultant on the visit, and/or the Administrators of Accreditation. The COA may not refute the standards findings of the site review team. The COA's task is to review the standards findings and to discuss the accreditation recommendation in light of the findings.

At the COA meeting, the team lead and Commission consultant will present the site visit report and its accreditation recommendation. Institutional representatives who are present will have an opportunity to make a statement, although they are not allowed to dispute the findings. The COA will deliberate about the report and decide whether to accept or modify the site visit team's recommendation. The COA will include in its accreditation action any stipulations placed on the institution, the due date by which the institution must remedy those stipulations, and whether a follow up report or a revisit in the seventh year should occur. For a thorough discussion of this process, see Chapter 9 of this Handbook. Following deliberations, the COA will vote on an accreditation status and will specifically identify any stipulations to be placed on the institution and the means by which the stipulations may be removed.

Attendance at COA meetings by the institution may be in-person or virtual, via technology. If the institutional personnel choose to attend the COA meeting in person, the institution is responsible for all expenses involved in attending the COA meeting. Further, in the event of an appeal of an accreditation decision, the institution must bear the cost of making the appeal and attending any appeal hearings or meetings. If a revisit is required, the institution must assume the costs under the extraordinary fee policies of the Commission, and the institution must assume the cost for attending the COA meeting in which the revisit decision is being made

VIII. Appeal Procedures

In the event the institution believes the site visit team demonstrated bias or acted arbitrarily or capriciously or contrary to the policies of the *Framework* or procedural guidelines, it may appeal the team recommendation to the COA within 30 days of its decision (see *Accreditation Framework, page 22)*.

The institution may also file a dissent with the Commission regarding the action of the COA if it believes that the COA demonstrated bias or acted arbitrarily or contrary to the policies of the *Framework* or procedural guidelines. In that case, the Commission consultant will help the team lead prepare for and present the review team perspective.