CCE®
THE COUNCIL ON
CHIROPRACTIC
EDUCATION

Academy of Site Team Visitors Manual

Guide for Site Team Chairs, Team Members & Observers

The Council on Chiropractic Education®
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Introduction

The Academy of Site Team Visitors Manual is designed specifically for site team visitors (evaluators), both experienced and newly assigned members. All team chairs, team members and observers, regardless of their experience, should read this manual carefully and familiarize themselves with its contents and processes. As processes and requirements change in the evolution of the accreditation arena, coupled with Council revisions to policies and procedures, an update to the document has been completed in this 2018 version.

This manual was prepared for the guidance of CCE Site Visit Teams, which consist of professional practitioners, administrators, academicians and educators, who read self-studies, conduct site visits, evaluate the requirements of the CCE *Standards* (Doctor of Chiropractic Degree and Residency Programs), and develop overall recommendations for the Council on Chiropractic Education (CCE).

We truly appreciate and thank the many volunteers who give their time to participate as site team members.

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Appendices

I. Planning and Preparation

A successful site visit depends on preparation. Much of the success of a team visit is established in the planning and involvement of the Council Chair, Council Site Team Academy Committee Chair (*STAC Chair*), CCE Administrative Office staff, Site Team Chair (*Team Chair*) and team members before they ever arrive on campus. Letters, telephone, e-mail, and conference calls and distant technology all have their place in this planning.

The CCE staff and the team chair work together in planning the schedule for the accrediting visit. It is important for the team chair to talk with the staff about details of the visit as soon as the site team has been selected, and after the program has accepted the team. The staff and/or the team chair are responsible for sending a great deal of specific information about the visit to team members and the program.

Schedule of Accreditation Activities

In accordance with the U.S. Department of Education Title 34 Code of Federal Regulations (CFR) Section 602.19 the Council on Chiropractic Education must reevaluate, at regularly established intervals, the institutions or programs it accredits and monitor the institutions or programs throughout their accreditation period to ensure they remain in compliance with the CCE *Standards*.

With this in mind, the Council has established a CCE Schedule of Accreditation Activities for each program it accredits. This schedule determines when a comprehensive site visit, interim site visit, and other reporting mechanisms are required by the program.

Doctor of Chiropractic Degree Programs - Schedule

CCE has established policies and procedures that require a comprehensive site visit to every DCP it accredits on an eight-year cycle for DCPs already accredited by the Council and a four-year cycle for DCPs that are granted initial accreditation. An interim site visit is conducted at the discretion of the Council for DCPs already accredited and for programs on the eight-year cycle it will normally occur at the four-year mark, halfway through the accreditation cycle.

Residency Programs - Schedule

CCE has established policies and procedures that require a comprehensive site visit to each residency program it accredits. While residency programs may vary in length, a one-year program is granted initial accreditation for a three-year period. Subsequently, the reaffirmation accreditation schedule is on a six-year cycle.

Letter of Intent

Approximately 18 months prior to the scheduled comprehensive site visit and 12 months prior to the submission of the Self-Study, the CCE contacts the program and requests a letter of intent from the President/CEO regarding their intentions of reaffirming their accreditation status with the CCE. Once the program acknowledges their intent to reaffirm, the CCE informs the program of the requirements for submission of their Self-Study and site visit preparation.

The CCE establishes the Self-Study and site visit requirements for those programs not already accredited by the CCE, after a formal application and the required initial eligibility documentation has been submitted, reviewed and approved by the Council.

Selection of Site Visit Team

The CCE staff, in coordination with the Council Chair if applicable (or designee if conflict exists), selects the site team in accordance with CCE policies and procedures from the Academy of Site Team Visitors (*Academy*). If site team members have conflicts with the dates or are unavailable, the CCE staff continue to contact members of the Academy until teams are fully comprised.

When the site team is established, the program President/CEO is sent the Team Agreement Form for review of the selected team. The program may accept the team as presented or provide reasons why any proposed team member should not serve on the site visit. The decision of the program will not be based on personal reasons, but rather, if any of the site team members have a conflict of interest with the program that was otherwise unknown to the CCE staff, i.e., consultant of the program, recent candidate for position of hire, etc. The program is encouraged to discuss any concerns about proposed team members with the Council Chair and/or CCE President before submitting a request for removal due to the time constraints involved in the process. Any request for removal of a proposed team member must be submitted in writing to the Council Chair and must clearly explain why service by the individual could be unfair, deleterious or in conflict to the accreditation process. Such a written request must be submitted to the Council Chair within seven (7) business days of the programs receipt of the selected team. If any conflicts are determined by the Council Chair and/or CCE President, the CCE staff contact other members of the Academy for selection on the team.

HIPAA/HITECH Requirements (Business Associate Agreement)

Pursuant to the Health Insurance Portability and Accountability Act ("HIPAA") of 1996, the Health Information Technology For Economic and Clinical Health ("HITECH") Act and its implementing regulations, the program is considered a covered entity that is permitted to disclose Protected Health Information to persons or entities that provide certain services for or on behalf of the program and engage the services of CCE, an accrediting organization, to provide accrediting services to the program and acknowledges that CCE requires access to Program's Protected Health Information to conduct its accreditation activities.

In this regard and along with the Team Agreement Form, the program is forwarded the “Business Associate Agreement” (BAA) and is requested to review and sign the document with CCE. The BAA assists the team in the reasonable access to clinical files and patient records protected under HIPAA and HITECH. It is vital to protect the confidentiality of any private health information reviewed during the visit. Logs retained by the team member should not include patient identification information (e.g., patient name, SS number, etc.), but rather should use the clinic’s internal code. Private health information should not be recorded, except as absolutely necessary for accreditation review purposes. A copy of the signed agreement is provided to the site team prior to the visit.

Notification to Site Team and Travel Arrangements

Each team member is provided with a Team Member Agreement to Serve form that must be signed and returned to CCE staff, (see Appendix I, Site Team Agreement Cover Letter and Appendix II, Team Member Agreement to Serve). Upon receipt of the signed form, the CCE staff provides each team member with electronic access to site visit documents, such as an electronic copy of the programs Self-Study, or Interim, or Progress Report and the following items:

1. CCE *Standards (*Edition utilized to complete the submitted program *S*elf Study).
2. CCE *Manual of Policies*
3. CCE Accreditation Manual
4. Academy of Site Team Visitors Manual
5. Site Visit Assignment Matrix (see Appendix III and IV for DCP and residency examples)
6. Team Report Timetable (see Appendix V)
7. Site Team Contact Information
8. Copy of the Council letter to the Program following the previous progress review (if the Council requires the team to review any open areas of concern while conducting the site visit).
9. For Interim Site Visit, (only), a copy of the Council letter to the program regarding the primary areas within the CCE *Standards* that will be reviewed by the team.
10. Other documents recommended by the CCE staff and/or Team Chair.
11. A copy of the signed Business Associate Agreement.

The CCE staff provides the site team with access to the above documents and the program’s self-study report approximately sixty days before a visit. Interim and Progress reports are received approximately 30 days prior to the site visit and provided to the site team by the CCE staff.

The Site Team Agreement letter from the CCE staff encourages team members to make airline reservations as far in advance as possible to acquire the best fare. In accordance with CCE policies, at least 30 days prior to the first travel day is required.

The CCE staff notifies team members of the specific dates and times they must, arrive and depart by, and nearby airports when making their respective travel arrangements.

In some cases, the lodging location will have an airport shuttle service, but team members are encouraged to procure the most cost efficient transportation available as per CCE policies if shuttle service is not available. In many cases, the Team Chair or CCE staff rent a vehicle for site visit transportation. Per CCE policy, it is not permissible for team members to rent cars individually unless prior approval is obtained from the CCE President.

Coordination of return travel to the airport also is an important consideration. In most cases, the CCE staff arrange for transportation. Team members are provided with the date and time of the exit interview to make appropriate airline reservations, and typically should not make return reservations before noon on the final day of the visit.

Lodging

The CCE staff, when applicable, works with the program accreditation liaison, to make the necessary lodging reservations for all team members. Lodging information is provided to the team, i.e., name, address, and telephone number of the hotel where the team will stay.

For a four-day comprehensive site visit, reservations are typically made for Sunday through Wednesday evenings. If a team member needs to extend their stay prior to or after the normal visit due to flight arrangements, they must contact the CCE staff in advance both for notification purposes and also to revise the room reservations at the lodging location.

Team Room Arrangements

The CCE staff, working with the program accreditation liaison, make arrangements for the program/college to provide a workroom for team members, to include computers, printers, copier, supplies, etc. (see Appendix VIII). In most cases, the computers are set up with Intranet access and Microsoft Word, Excel and Adobe Acrobat capabilities. The CCE staff emphasize to the program that the room should be set up and the computer systems thoroughly checked in advance of the visit. The CCE staff assist team members with computer support activities. Often, the program/college also have a computer support technician available if the need arises.

In most cases, the team room is secured and restricted to team members only during the visit. A list of required onsite documents is also provided to the program in advance to be available in the team room for review and reference by the site team (see Appendix VI and VII).

II. Site Visit Processes & Communication

The CCE staff and the Site Team Chair establish and manage all aspects of a site visit and provide critical roles throughout the process. These roles are outlined in the following sections, but are not all inclusive, and some aspects of the process may require changes in the respective roles.

CCE Administrative Office Staff Role

The CCE staff serve at the direction of the CCE President, and work closely and cooperatively with the Team Chair in matters related to accreditation site visits. The CCE staff are not reporting members of the team, but provide guidance on policy and procedural matters, as well as administrative support for the team. The CCE staff provide guidance to the Site Team regarding their assigned responsibilities on the visit, assist in clarification and language in the requirements for accreditation as listed in the CCE Standards, monitor and guide consistency of processes, provide draft report compilation, and explain Council processes and procedures to the site team and program personnel, as needed. CCE staff attend meetings between the team and program personnel, assist the team in obtaining and reviewing information, and participate in team discussions, but do not evaluate the program.

The CCE staff coordinates the following overall details of the site visit process:

a. Completes an Executive Summary Report in its review of the program Self-Study, and provides guidance in accreditation and site visit processes to the program and site team.
b. Identifies appropriate site team chairs, site team members and observers for assignments to site

visit teams (in collaboration with the CCE President, as needed).

c. Communicates with the program's Accreditation Liaison and President/CEO to provide information and assistance, establish dates, and obtain agreements.
d. Works with the site team to convey information in its review of the program Self-Study, regarding specific areas or processes the team should address during its visit.
e. Distributes site visit evaluations forms to the site team members following each visit.
f. Provides questionnaires to the program following each visit to gather feedback for improvement of processes.
g. Provides guidance on CCE processes to the program regarding the Council Status Review meeting.

Duties and Responsibilities include, but are not limited to the following:

a. Develops, in conjunction with the program and team members, the site visit meeting/interview schedule.
b. Develops the Site Visit Assignment Matrix for assignment responsibilities within each area of the CCE Standards and provides to site team.
c. Develops and provides the Team Report Timetable to the site team.
d. Maintain communication with program accreditation liaison prior to, during, and through the Council Status Review Meeting regarding the visit.
e. Verify and assist the program, in the arrangement of logistical and technical support for the site visit, i.e., scheduling, lodging, meeting rooms on campus and at the hotel, meals, additional interviews, software support, ground transportation, etc.
f. Assist the Team Chair to ensure all areas of the requirements for accreditation in the CCE Standards are evaluated in accordance with the Site Visit Assignment Matrix. Receive all assigned written report materials from site team members and compile draft site team report on site.
g. Coordinate, format, and distribute drafts and final report with team members, Team Chair, and the program in accordance with the Team Report Timetable.

Activities for the Site Team Visit

a. Communication
    1) Send copies of all correspondence and email transmissions with the site team or the program to the Team Chair.
    2) Determine if team members have special needs or require additional documentation from the program, and relay such requests to the program.
    3) Contact the Council Chair and/or CCE President, if necessary, at any time during the accreditation visit process.

b. Prior to the site visit:
    1) Collaborate and prepare necessary documents with the program accreditation liaison regarding the site visit details (i.e. arrival date/time, lodging, meals, Schedule of Events, and subsequent activities).
    2) Provide site team arrangement information to the team members regarding the logistics of the site visit (i.e. program contact information, travel/transportation arrangements, arrival date/time, lodging, meals, location and date/time of Initial Team Meeting, and any other activities the team should be aware of prior to arrival).
    3) Ensure hotel reservations for the team have been made.
    4) Ensure transportation needs have been arranged or communicated (airport to hotel and hotel to program each day).
    5) Ensure electronic documents (CCE Standards, Policies, program Self-Study, etc.) are available for use by the team as needed during the visit.
    6) Ensure the program equips the team room as outlined in the Team Room Setup Requirements (Appendix VIII), and also provides the documents required for review as indicated in the Onsite Document Requirements listing (Appendix VI & VII).
    7) Arrange for meeting space availability at the hotel for the Initial Team Meeting and also during post-discussion team meetings following each day of the visit.
    8) Prepare a site team report template based on the team assignments and CCE Standards being utilized during the visit and forward to the site team for preparation of the report.

9) Ensure additional site visit documents/materials are provided to team members or made available for review in the team room upon arrival as requested.

c. During the visit:
   1) Have available for site team member use, the CCE *Standards*, current edition of the CCE *Manual of Policies*, CCE *Accreditation Manual* and any other accreditation related documents.
   2) Provide Schedule of Events of team meetings and interviews to all team members.
   3) Coordinate and reschedule team meetings and interviews as necessary.
   4) Arrange any unforeseen logistical changes while ensuring team activities are not affected and/or interrupted.
   5) Function as the CCE process/policy support for the team and the program.

Site Team Chair Role

The Team Chair serves at the direction of and reports to the CCE President, and works cooperatively with the CCE staff in matters related to accreditation site visits. The Team Chair has oversight responsibilities for the site team, but is also a reporting member of the site team. He/she may have limited areas of responsibility regarding report writing assignments based on experience of other team members and/or Council requirements. However, responsibility for overall report completion is required. While responsible for assembly and editing of the site team report written by team members, the Team Chair does not exercise judgment on the qualitative statements of team members.

Duties and Responsibilities; include, but are not limited to the following:

a. If requested, assist the CCE staff in identifying appropriate site team members.
b. Assist in the organization of site visit activities with the CCE staff; lead and assist site team members in preparation for and during accreditation visits; and interact with the program President/CEO during the visit.
c. Reviews Site Team Assignment Matrix with team members and adjusts assignments of responsibilities, if necessary and in conjunction with CCE staff, based upon experience of team members, etc.
d. Assure that all areas of the requirements for accreditation listed in the CCE Standards are evaluated and discussed by the site team as necessary, direct team members in the timely compilation of all assigned report writing requirements prior to leaving the site, and review the draft and final site team report following the Team Report Timetable.
e. If requested, assist with training of Academy members.
f. Perform special assignments related to site visits, as requested by the Council Chair or CCE President.

Experience, Education and Training:

a. Recommended by Council Site Team Academy Committee and/or Council Chair.
b. Applicable experience conducting accreditation site visits and producing site visit reports.
c. Demonstrated ability to perform responsibilities with limited supervision.
d. Excellent oral and written communication skills; expertise in word processing.
e. Senior level administrative experience, in higher education, preferred, but not required.
f. Attendance at Academy training and/or workshops.
g. Doctorate (or equivalent) preferred, but not required.

Activities for the Site Team Visit

a. Communication
   1) Contact the CCE staff at any time with questions about any aspect of the visit, i.e., CCE Standards, Manual of Policies, Council procedures, unique situations, or to confirm that the team is conducting the evaluation as charged by the Council. Note: The President and/or CCE staff inform the Council Chair, when applicable, regarding communication with the Team Chair and may forward questions to the Council Chair for determination.
   2) Copy CCE Staff on all correspondence with the program and forward all email transmissions to the site team.
   3) Contact the CCE President, at any time during the accreditation site visit process.

b. Prior to the site visit:
   1) Verify with the CCE Staff that:

(a) Hotel reservations and transportation requirements have been made;
(b) CCE electronic documents are available as needed during the visit;
(c) Properly equipped team meeting room is available on campus with materials required and/or requested to support the program self-study;
(d) Meeting space is available at the hotel for the team meeting; and
(e) Schedule of team meetings and on-campus interviews distributed to team members and the Program accreditation liaison.

2) Clarify and review team assignments as shown in the Site Visit Assignment Matrix, (see Appendix III or IV), based on areas of expertise.
3) Establish the agenda and set the time for the Initial Team Meeting, i.e. Sunday evening.
4) Require team members to review the *CCE Standards*, CCE *Accreditation Manual, Academy of Site Team Visitors Manual*, and all related CCE *Policies,* and insuring that these documents are available to team members during the site visit.
5) Plan the agenda for the first on-campus team meeting (Introduction Briefing) with the program President/CEO and other program representatives.

c. During the visit, the Team Chair is to:
1) Primarily function as team leader.
2) Ensure that all CCE accreditation requirements are reviewed by at least one team member and validated/verified by another, when applicable.
3) Arrange for less experienced team members to work closely with those more experienced.
4) Request team members begin writing regarding their findings each evening, to enable timely completion of the composite team report.
5) Coordinate and facilitate the site visit, in coordination with CCE staff, including team discussions and evaluation of program materials and evidence.

Social Media

CCE has a duty to keep confidential information from being revealed anywhere, especially on the internet. Team members cannot post pictures and/or comments regarding the pre-, during, or post- site visit activities at any time. As indicated in the signed confidentiality agreements, team members must maintain confidentiality beyond their service in the Academy and always hold such matters confidential.

Also, under no circumstances can team members link blogs, websites, or other social networking sites to the CCE website.

III. Self-Study, Additional Documentation & Responsibilities

Self-Study

Approximately 18 months prior to the site visit, the program is officially notified of the date the Self-Study is due to the CCE Administrative Office. The self-study is received in the office for review by the CCE staff six months prior to the visit. After their review, an executive summary report is sent to the program notifying the program of any additional requirements, whether a self-study update is optional or required, and also to provide feedback to the program regarding the content and format of the Self-Study. The program reviews the executive summary report and takes appropriate action. If a self-study update is warranted, the program forwards an update report to the CCE Administrative Office for distribution to all team members (no later than 30 days prior to the site visit).

The CCE staff then forwards the Self-Study and update report, if applicable, to the assigned site team for their review of the document prior to the site visit. NOTE: The Council is also forwarded the Self-Study for review 30 days prior to the status review meeting with the program.

Review of Documents Submitted

Every team member should promptly read the self-study and all site visit materials thoroughly and carefully. This allows time for team members to take note of missing information and develop questions.

The site team conference call occurs several weeks prior to the site visit. Team members should be prepared to discuss any unclear or missing information in the self-study during the team conference call. In some cases, the team member may wish to obtain additional information from the program prior to the visit; this should be coordinated with the CCE staff and Team Chair during the site team's pre-visit conference call. The CCE staff and/or Team Chair will forward requests to the program with instruction to provide additional information either prior to the visit or in the site team room.

One of the most frequent complaints from the program administration and faculty members is that team members have not read the self-study and attached materials. This is not a document that is read for the first time on the airplane en route to the campus. Team members should only request additional information or clarification of information when it is not already provided in the self-study and it is necessary to evaluate the requirements within a Standard. Additionally, team members should thoroughly review the On-Site Document list prepared by CCE staff in conjunction with the executive summary report, prior to submitting requests for additional information.

It is important to remember that even though a team member may have a specialty and may have been assigned certain areas upon which to focus during the visit, all team members are ultimately responsible for all aspects of the visit. The final report is a consensus document, with input from all team members. For this reason, during the document review process each team member may ask questions about any part of the self-study and related documents.

Principles to keep in mind

As team members read the self-study, they should keep in mind some general principles of accreditation, and apply the standards and procedures with respect for the rights and responsibilities of institutions and programs to identify and establish:

a. their respective missions, goals, and objectives;
b. educational principles and methodologies used to pursue functions implicit in their various missions, goals, and objectives;
c. specific choices and approaches to curricular content;
d. areas of study pursued through scholarship, research, and policy developments;
e. specific personnel choices, staffing configurations, administrative structures, and other operational decisions; and
f. content, methodologies, and timing of tests, evaluations, and assessments.

Review of Site Team Member Responsibilities

Prior to the site visit, the team member should review and be familiar with the specifics outlined in the Site Team Agreement to Serve, and all documents and information provided to the site team to ensure that he/she understands the responsibilities of being a site team member, and the importance of the visit.

Team members are expected to act in a professional manner at all times. Attire during campus visits is business attire, not casual. Attire during the team meetings in the evening at the hotel is casual. There should be no plans for social or recreational events during the visit as time is of the essence to maximize the teams' purpose during the visit.

IV. Site Visit Logistics

General Information – Expenses

The program ultimately pays all expenses for the accreditation visit. With that in mind, the CCE implores that team members be reasonable with expenses -- especially to be considerate when scheduling airline reservations. Team members must keep receipts for reimbursable expenses incurred during the visit. It is important to send the CCE Travel Expense Report/Claim and receipts to the CCE Administrative Office within ten (10) days after the visit has concluded. CCE Policy 94, Expenses, Stipends and Honoraria, is provided to each team member while conducting a visit along with the expense report - form (also available on the CCE website). All team members should be familiar with this policy and ask questions if clarification is needed.

Precautions

Precautions are of particular importance to the CCE as they give general guidance for some of the "what to do" and "what not to do" issues during the site visit process. The CCE Accreditation Manual provides a list of these issues that should be reviewed by all team members prior to a visit. As a reminder, the CCE staff and/or Team Chair review these items at the Initial Team Meeting prior to the visit for discussion and clarification purposes.

Conducting the Site Visit

The CCE Staff and Team Chair start early

Prior to the site visit, the CCE staff sends the program the Onsite Document Requirements (see Appendix VI & VII), which informs the program what documentation ***must*** be made available to the team while on site, if not already provided in the self-study. This list is not all-inclusive, as the team may need additional information as required by the CCE *Standards*, CCE policies, and/or following their review of the Self-Study documents. The CCE staff also sends the program a list of materials (supplies, computers, copiers, etc.) that should be available in the workroom for the team's use while on site (see Appendix VIII).

Upon initial arrival to the team's workroom on the first day of the visit, both the Team Chair and the CCE staff review the room set up and materials made available for the team. All team members should conduct a thorough review of the documents provided by the program before requesting additional information to ensure the documents needed are not already available in the team room.

Initial Team Meeting

The Initial Team Meeting normally is scheduled at 6:00 p.m. on Sunday evening (or the day prior to the scheduled first day of the visit), and is mandatory for all team members to attend. The Team Chair or CCE staff may move the meeting to an earlier time if it doesn't conflict with any team members' arrival times. The CCE staff and Team Chair give a briefing during the meeting to review the logistics and team responsibilities for the visit and provide any updates or additional information to the team. This is the opportune time to clarify any questions the team may have concerning the site visit.

The purpose of the initial meeting is to:

a. Acquaint site team members with one another.
b. Meet and receive a briefing from the CCE staff.
c. Review arrangements for meeting accommodations, meals, and transportation.
d. Review the role of the Team Chair and CCE staff.
e. Review overall team responsibilities.
f. Review the roles of individual team members, including specific individual assignments.
g. Review the role of observers if any are present.
h. Review the Schedule of Events (introduction meeting, individual interviews, team meetings, open-door discussions with program constituents, exit interview, etc).
i. Relay any special information regarding location of materials, facilities, or personnel.
j. Discuss preliminary impressions of self-study, update, and any ancillary documents provided.
k. Discuss any specific directions from the Team Chair and/or CCE.

NOTE: No effort is made to reach any conclusions at this meeting.

Responsibilities of the Team Chair

The Team Chair has the overall responsibility to ensure the visit is conducted in a professional manner. Some simple guidelines are as follows:

a. Keep the team on schedule and focused on the requirements of the Standards. Much coordination and effort went into the planning and preparation of the visit by numerous individuals. Keeping the team on task provides for ideal report writing conditions and less long work hours.

b. Emphasize teamwork. The team talks, consults and writes together, and the visit and report are team efforts in which all team members have ownership.

c. Be patient and flexible. When unsure, assist the site team in locating appropriate documentation. If it is not available, state that facts.

d. Maintain contact and communication with the program President/CEO, who is probably anxious and shouldn't be surprised of any results at the end of the visit.

e. If the team encounters any unforeseen or problematic situations, for example, faculty members who dispute the self-study or inflammatory or derogative statements by students or program personnel, take these matters to the program President/CEO immediately for clarification and context. Such things must be handled delicately or they may disrupt the visit.

Balancing the Workload

During the Initial Team Meeting, it is important for the team chair to review these assignments with the team and answer any questions regarding the assignments. This session is especially important for new team members.

Individual team members write their assigned sections of the report with regards to each requirement for accreditation within the CCE *Standards*, so the Team Chair should ensure that assignments are clear.

CCE staff prepare the introduction section of the report in advance of the visit but may solicit information from the Team Chair to complete this task.

Although individual team members are responsible for specific sections of the report, they typically participate in the evaluation of all Standards.

Group meetings, i.e., faculty, students, etc, are just as important as individual interviews. Team members must ensure they make the time necessary to be available for these meetings. The Team Chair and CCE staff assist in this area with reminders of group meetings.

Site teams may include members with little experience. In these instances, the CCE staff and/or Team Chair takes the extra time necessary to prepare these individuals for the visit and coach/train them as necessary. In almost all instances, the CCE staff only assign an inexperienced team member with an experienced team and/or team member. Some experienced team members may be assigned additional tasks, and/or shadow the Team Chair for training purposes based on recommendation from the STAC regarding their selection as a Team Chair for future visits.

It is extremely important that the Team Chair and team members work closely as a unit and support the overall responsibilities of the team.

Schedule of Events

The CCE staff, working with the program accreditation liaison and the site team, prepares a Schedule of Events (SOE) for the visit activities prior to the visit. The schedule consists of, at minimum, various individual meetings with program personnel as well as group and committee meetings as outlined in the CCE Accreditation Manual. Team members are provided the schedule prior to the visit. After they have reviewed the program self-study they may provide the CCE staff and Team Chair with requests for additional meetings they deem necessary, during the team conference call.

The SOE is also be distributed to all team members the evening before the first day of the site visit, (Initial Team Meeting), with any edits that may have occurred during the review process. The program accreditation liaison is provided a copy of the SOE (prior to the team's arrival) for distribution to program representatives as they deem appropriate. During the visit, team members may add or delete meetings/interviews at their discretion, in coordination with the CCE staff and Team Chair. The CCE staff maintain the master schedule and utilize it as the record of all persons/groups interviewed (names, titles, etc.) facilities visited, and procedures/activities directly observed.

Campus Tour

Scheduling of a campus tour is left to the discretion of the Team Chair and/or CCE staff. Generally, if a brief tour is warranted, the campus tour occurs in the morning of the first day of the site visit, just after arrival and prior to the introduction briefing. This is designed to be a directional tour only and assists the team members to get a better feel for the layout of the campus. The tour is not mandatory and some team members may not wish to participate in the tour based on their team assignments.

Introduction Briefing

Generally, the site visit begins with an introduction meeting on the first day at 9 a.m. with the program

President/CEO and his/her cabinet and/or representatives.

At this meeting, the Team Chair provides brief remarks on the purpose of the visit and introduce the team members and CCE staff. The Team Chair also takes this opportunity to explain the role of any observers that may be accompanying the team, and tailor the information provided that is appropriate to the type of observer; i.e. USDE or CHEA representative, Councilor or Academy Member in Training. The Team Chair explains to the program that every team member may not visit with every program rep, and this shouldn't be viewed as anything other than the process of the visit. In most instances the program is familiar with site visit processes, but this added information may be necessary if the program is being visited for the first time by a CCE site team.

Meals and Team Meetings

Lunch schedule

In most instances, team members have lunch in the campus cafeteria or program personnel order take-out for the team. The CCE staff assist in this matter by ensuring the schedule provides information regarding meal options, i.e. campus cafeteria. At his/her discretion, the Team Chair may have a working lunch, (e.g. the day before the exit interview), with team members and CCE staff to review the visit schedule and discuss various topics with the team.

Dinner Accommodations

Dinner reservations are normally set up by CCE staff. In most instances, group dinners are set up for the team on Sunday night at the location where the team is lodging (or a nearby location), so the team does not have to travel any distance on the first night of the visit. Team dinners are scheduled following the evening team meetings. If dinner is in a public place, care must be taken to avoid confidential team discussions.

Evening Team Meetings

Typically, the team is on campus from 8:00 am to 4:30 pm each day. The team then returns to the hotel for a team meeting and then dinner.

For one or more hours, typically from 5:00 – 6:00 pm, the team discusses progress made, any issues that need the CCE staff or team chair assistance, and overall first day impressions. Questions or concerns are openly discussed and a plan for action is developed. Frequently the meeting on the first night of the campus visit is the shortest. After deciding upon the questions that need to be addressed, documents that need to be requested, additional persons that need to be interviewed, and the overall schedule for the next day, the team may decide to begin working on the draft report in the team room or it may decide to allow members to work on their sections of the report in their own rooms.

On subsequent evenings, some teams find that it is most productive to stay assembled as a group and work on the report. In this way, as sections are drafted they can immediately be reviewed by other members.

In rare cases, depending on the situation, the team may allow interviews/meetings to be scheduled in the evening at the hotel with program personnel. In all instances, the Team Chair and CCE staff has discretion of this process.

On the last evening of the visit, with the assistance of the CCE staff, the team completes the draft report, including the compilation of *commendations* and *concerns* with *recommendations*. The Team Chair and CCE staff, following the visit, spend additional time editing the report, ensuring that it addresses all the *Standards*, uses the correct reporting format, and is procedurally correct. The site team, however, has the responsibility of completing their draft report sections within their areas of responsibility. Team members must provide their completed sections to the CCE staff (in electronic format) before leaving the site.

Making decisions

Consensus among team members is the goal. Nonetheless, on some occasion's team members may disagree about a *concern* or *commendation*. In such cases, the Team Chair must lead the team to a decision all members can support.

Exit Interview

The Team Chair, site team members, and CCE staff meet with the program President/CEO, and any others the program wishes to have present. As a courtesy, the Team Chair and CCE staff also meet privately with the program President/CEO prior to the exit interview to discuss the visit in an open dialogue and provide clarification, advice, and/or explanation of concerns/recommendations to provide context for the concern.

During the visit, the Team Chair and CCE staff meet periodically with the program President/CEO and discusses and determines what type of exit interview/meeting will occur at the end of the visit. In all instances, the Team Chair and program President/CEO agree to the format of the exit interview in one of the below examples:

a. Open forum; oral presentation of *concerns/recommendation* and *strengths*, and open discussion about process only (no questions relating to findings); or

b. Open forum; oral presentation of *concerns/recommendations* and *strengths* only; or

c. Limited session (site team and selected program reps), oral presentation of *concerns/recommendations* and *strengths* only.

The Team Chair conducts the exit interview in accordance with the guidelines listed in the CCE Accreditation Manual, Section VI.I, Exit Interview with program. These guidelines include:

a. Provides opportunity for the program President/CEO to address attendees.
b. Briefs attendees on type and scope/format of exit session.
c. Restates and explains the purpose of accreditation and visit.
d. Explains terminology of report (i.e., *concerns*/no context, *suggestions*/optional, etc.).
e. Reviews the timetable for producing the draft team report, correcting errors-in-fact, producing the final team report, and obtaining the program response prior to the status review meeting involving the program, the Team Chair, and the Council.
f. Presents, without further review, oral statements regarding any *concerns with/recommendations* and *strengths* that will appear in the draft site team report.
g. If applicable, begins the open forum discussion regarding process only.
h. Closes exit interview by thanking the program for hosting the site visit and along with entire site team exits the campus/site.

V. Site Visit

Meetings and Interviews with the Program

The interaction of team members with the program's governing board/body, administration, faculty, staff, and student body or residents is a vital component of the visit. The on-site visit allows for team members to validate findings through observation, meetings with personnel and students, and other direct interactions. One or more team members may meet with selected individuals or groups, and the type (comprehensive, interim or focused) of site visit conducted determines which of these meetings is most appropriate.

Team members should reference the CCE Accreditation Manual, Section VI.E, Schedule of Events, and Meetings/Interviews with Program Personnel, which provides guidance for the interview and meeting processes by identifying each Standards, and certain individuals and groups the team members may meet with, and some topics for discussion at these particular meetings.

When conducting a site visit, a reminder of some "do's" and "don'ts" are as follows:

DO:

- Remember the importance of the visit to the program
- Use good communication skills with program personnel; listening without interrupting, asking clarifying questions, paraphrasing, summarizing, and using open-ended questions
- Always reference back to the requirements within the *CCE Accreditation Standards*
- Remain flexible with program's schedule
- Communicate with one another; open and transparent with team members and program

- Take advantage of the opportunity to learn from your fellow team members
- Follow-up; if you request evidence/information from the program and they do not provide it in a timely manner, remind them and ask again
- Enjoy your work
- Be professional and approachable, at all times;
  - Well-prepared; review the questions you have and who they should be directed to
  - Pleasant, polite, courteous to a fault (invited guests); remember, this is a collegial process meant to assist DCPs in advancing quality education
  - Fair, impartial, unbiased, neutral
  - Persistent, diligent, thorough, tenacious (but prudent)
  - Maintain confidentiality at all times
  - Do the job you have agreed to do; focus/complete your assigned responsibilities; honor your CCE agreement

DO NOT:

- Be unnecessarily disruptive; Debate issues with the program
- Step outside of your boundaries (CCE Standards/Policies)
- Think you know it all; Be the police
- Work in isolation from one another; no team communication
- Get lost in the details; head down 'rabbit holes'
- Be unprofessional

Off-Campus Visits (if applicable)

Some programs operate clinics at remote (off-campus) sites. The team member(s) responsible for the clinical assessment and operations on the visit will visit one or more off-site clinics, depending on the program requirements. The CCE staff contacts the program accreditation liaison to coordinate these activities. This requires coordination of transportation, availability of the clinic director. Time should be allowed for visiting with students at the clinic, meeting with the director, and review of patient records, (if not electronic). Because of time limitations, it may be necessary to omit visiting small clinics and concentrate on visiting only the larger clinical operations or those, which have a unique contribution to clinical education. In particular, if a program relies upon a specific clinic location to accomplish clinical training and clinical competency assessments, then that site should be visited.

VI. Writing the Site Team Report and the Response

The Report

The Team Chair is responsible for ensuring that individual team member contributions appear in proper sequence in the team report according to the template provided prior to the visit. In preparing the team report, the Team Chair may seek advice from the CCE staff about report organization, formatting, and content.

The Team Chair and CCE staff write the introduction, compile the composite report, and ensures the accuracy of the summary listing of any *commendations* and *concerns w/recommendations*. The report is a qualitative assessment of the entire program, but it need not be lengthy. The team report focuses on how the program effectively addresses the CCE *Standards*. Validated and verified deficiencies are addressed as concerns, and program strengths as commendations. The report is to be clear and constructive in order to help the program. The evidence used to arrive at such conclusions must support any evaluative statements.

The report clearly describes any concerns, and recommends a plan for overcoming such challenges. The report must not contain material not supported by findings, or outside of the scope of the Standards.

The site team does not stipulate whether or not the program is in compliance with the Standards; this is the prerogative of the Council. However, the team must describe, in narrative, the activities and supporting data to determine how well the program is addressing and fulfilling each requirement. The CCE *Standards* and the examples questions and topics are provided in the CCE Accreditation Manual to assist the team.

Reports must provide accurate, fair, and constructive analysis, not just descriptions of current program activity.

Stated concerns must be accompanied by a *Standard* reference, explanation of the deficiency and evidence (or lack thereof) that supports the deficiency. Attempts to assist with resolution of concerns must be stated in the form of a *recommendation*. Team members should note that there might be several acceptable solutions to a *concern*. The *recommendation* should guide the program toward resolution, but not be prescriptive.

The c*ommendations* and statements of *concern* with *recommendations* in the report are parallel to the summary statements given by the Team Chair at the Exit Interview. All concerns, recommendations and commendations are underlined in the report.

The Team Chair must ensure that reported *recommendations* are firmly grounded in relation to the requirements for accreditation in the CCE *Standards*, are adequately supported in the narrative and based on team consensus.

Confidentiality

The site team report is kept confidential at all times. The Team Chair and the CCE Administrative Office retain all documentation for the report until completion of the status review hearing and a Council decision. The report then becomes the property of the program. Copies of the report, and the program response, are secured in the CCE Administrative Office in accordance with CCE File and Maintenance Disposition Plans. Team members should maintain all documentation, including the final report, from the visit until notified by the CCE staff for disposition instructions.

Drafting of Sections

Team members are responsible for drafting language for one or more sections or subsections of the draft report. Writing is to be brief and specific, emphasizing:

a. Qualitative assessment of the program's activities and outcomes in relation to the CCE Standards.
b. Strengths, including Standards references.
c. *Concerns*, including Standards references, supporting evidence, with associated *recommendations*.

Final Draft Language

Prior to the conclusion of the visit, the Team Chair must receive from all team members the final draft language fully addressing all components of the site team report. The Team Chair reviews and edits the language with the team on site to the extent permitted by time. <u>It is essential that all areas within the CCE *Standards* have been drafted by the team (in accordance with the Site Visit Assignment Matrix) and an electronic version provided to the CCE staff and Team Chair before the team leaves the site.</u>

Nature of the Report

a. The site visit team report *must*:
1) Reflect the consensus of the team.
2) Be fair, accurate, and thorough.
3) Discuss significant items in sufficient detail, while remaining succinct.
4) Address significant issues or deficiencies with the Standards, avoiding issues outside the realm of the Standards.
5) Weigh the quality of the achievements of the program.
6) Be written in the third person.
7) Use the words "team", "team members", "evaluators", "visitors" and/or "visit."

b. The site visit team report *must not*:
1) Include unverified information, assumptions or unsupported generalizations.
2) Include first-person statements or personal references to team members or program personnel (within narrative of report).
3) Indicate compliance or non-compliance with the requirements for accreditation of the CCE *Standards*.
4) Contain any team judgments about, possible Council actions.
5) Contain the words "inspector/inspection."

Concerns with Recommendations and Suggestions

The program is obligated to comply with requirements for accreditation of the CCE *Standards*. Any comment regarding failure to meet these requirements must be stated in terms of the type and amount of evidence examined and identify the ***concern***. Stated ***concerns*** must be bold/underlined, clarified with documentation and explanations, and accompanied by a Standard reference, and a notation of the evidence, or lack of evidence, leading to the ***concern***.

The report must include a *recommendation* for action that would appropriately address the ***concern*.** Recommendations are intended to guide the program toward meeting the requirements of the CCE *Standards*.

a. A ***recommendation*** *must* accompany every ***concern*** identified in the report. *Although a team must never state in its report that a program is not in compliance*, a concern may identify potential non-compliance issues. The team must give specific evidence in the narrative portion of the report to support the ***recommendation*.**

b. A ***suggestion*** is a statement regarding advice and/or improvement that *may* be taken, for the best interest of the program. *Suggestions* are provided only in the body of the report.
   1) *Suggestions* are written within an appropriate Standard reference. Proper language to support/explain the *suggestion* should be clear and included in the narrative writing. *Suggestions* cannot be provided as a stand-alone statement in the team report.
   2) The team may give advice to the program throughout the narrative of the report, but putting advice in the form of a *suggestion* can give it added weight and visibility.
   3) *Suggestions* do not appear in the summary list of *commendations* and *concerns* at the end of the report.
   4) The program is not required, but encouraged, to respond to *suggestions*.

Commendations/Strengths of Program

Commendations are laudatory statements regarding areas of exemplary performance indicating strengths in the program, not simply good intentions. The report must provide evidence for any *commendation* and should be linked to a corresponding reference in the CCE *Standards*.

To assist in formatting, examples of *concerns* with *recommendations*, *suggestions* and *commendations* can be found in Appendix IX.

Site Team Report Review & Distribution Process

Draft Report – Corrections of Errors in Fact

The draft report is distributed to each team member either by the CCE staff or Team Chair within 5 days of the last day of the visit.

a. Within six days of receipt of the draft report, team members review the report and provide narrative clarifications and/or edits to the Team Chair.
b. Within four days of the team members' response, the Team Chair (with the assistance of the CCE staff) assembles the final version of the draft report and the CCE staff sends it to the program with the Corrections of Errors in Fact Letter.
c. Within seven days of receipt of the letter, the program responds to the CCE Administrative Office and Team Chair with correction of errors in fact. Other than factual errors, i.e., title/name designation, number corrections, etc. the context of the draft site team report is not open to editing by the program at this time.
d. If such substantiation is extensive, the Team Chair may need to communicate with team members before completing the final report.

Final Report

Once any indicated errors of fact have been considered and acted upon by the Team Chair, an electronic version of the final report is sent to the CCE staff.

a. Within five days of receipt of the corrections of errors in fact, the CCE Administrative Office sends a cover letter and an electronic version (via email) of the final report to the program President/CEO and Accreditation Liaison. An electronic version of the report is also sent to the site team members (to include the Team Chair). This normally occurs within four weeks of the conclusion of the site visit.
b. The CCE Administrative Office also sends a copy of the cover letter to the program Governing Board Chair or governing official as an FYI for notification purposes of the scheduled status review meeting with the Council.

Program Response

Upon receipt of the final report, the program must submit a formal written response to the content, if the report contains any ***concerns***. This response is normally submitted 55 days following the conclusion of the site visit and must be received in the CCE Administrative Office no later than 30 days prior to the Council Status/Progress Review Meeting.

a. The program must review the entire site team report text and insert the program response text in larger, bold type at the appropriate places within the report narrative. The program *must* respond to any team *concerns* accompanied by *recommendations*.
b. Proper documentation must support and clarify the program response. Team *suggestions* may also be addressed, but the program is not required, although encouraged, to do so.
c. However, the Council may decide at the status review meeting with the program that the evidence supporting a suggestion coupled with the program response indicates a *concern* exists in this area. In which case, the suggestion may become a *concern* with an identified *recommendation*, and subsequently require further reporting by the program.
d. Updated ancillary documents and/or new evidence must also be appended to the response if applicable.
e. The narrative of any response to the Site Team Report must also describe any major program changes, as related to the *concern*, and provide updated outcome data since the site team visit.
f. The program must send one (1) electronic version (via email) of its response to the CCE Administrative Office in accordance with the cover letter and Team Report Timetable (Appendix V).
g. The team report then becomes the property of the program.
h. In the event that the site team report is released to any third party, *the team report must be published only in its entirety, never in an excerpt format;* unsupported excerpts might distort the intent of the report and compromise the process of accreditation.

Review of Program Response to Final Report

The CCE staff and Council review the program response in preparation for the status/progress review meeting.

VII. Responsibilities after the Visit

Immediately following the visit, all team members must submit their expenses to the CCE Administrative Office in accordance with CCE Policy 94, Expenses, Stipends and Honoraria. Any questions regarding expenses should be directed to the CCE staff.

The Team Chair and team members must secure (and keep confidential) all documentation pertaining to the site visit until the Council has made a final accreditation decision. Once the Council has formally announced the granting of initial or reaffirmation of accreditation of the program visited, CCE staff will notify all team members for disposition instructions. In cases where the Council does not grant such accreditation, the CCE staff contacts the Team Chair and team members and instruct them to keep the site visit documentation until further notice or forward to the CCE Administrative Office.

In some instances, the Council may require follow-up (focused) site visit(s) to the program over the next year(s). In these cases, some team members from the original site team may be requested to perform this visit along with other team members who had not previously conducted the visit. This helps to ensure continuity while also allowing for a "fresh set of eyes".

VIII. Other Site Visits

DCP - Interim Site Visits

These types of visits are monitoring reviews scheduled midway through the routine accreditation cycle, usually at the 4-year mark for DCPs, which are on an eight-year accreditation cycle. The Council has the option of conducting the visit if no concerns or issues have been identified. In most cases the Council requires an interim visit to ensure the programs remain in compliance with the CCE

Standards and policies, in accordance with USDE CFR 602.19, Monitoring and Reevaluation of Accredited Institutions and Programs. Typically, two or three team members (to include the Team Chair) comprise this site visit team and are selected in the category(s) of expertise needed to perform the visit. The length of this visit varies based on the review needed by the Council, but generally, two to three days is appropriate with the exit interview on the last day of the visit.

A self-study is not required from the DCP; rather, the Council sends a letter of notification to the DCP, which outlines the specific areas of the Standards the site team will review while on site, and requests an *Interim Site Visit Report*. Team members are assigned specific areas based on their expertise. Site team members, through the CCE staff and Team Chair, may request documentation be sent to them from the DCP prior to the visit, or have the information available for review while on campus, following their review of the *Interim Site Visit Report*.

Other facets of the visit are the same as with a comprehensive visit, i.e., team meeting day before visit, introduction briefing/exit interview, team report timetable, etc. The CCE staff typically attend these visits to provide guidance on policy and procedural matters, as well as administrative support for the team. The Team Chair and CCE staff communicate at all times prior to, during, and following the visit to ensure all processes are complete.

Focused Site Visits

These types of visits are focused reviews conducted at the discretion of the Council to address issues or concerns needing attention or follow-up. Focused site visits may be required for a substantive change. Generally, two-three team members (to include the Team Chair) comprise this site visit team and are selected in the category(s) of expertise needed to perform the visit. The length of this visit varies based on the review needed by the Council, but generally, three days is appropriate with the exit interview on the third day.

Again, a self-study is not required from the program; rather, the latest Council letter sent to the program regarding the issues or concerns noted are the focus of this visit along with a required progress report from the program. Team members are assigned specific areas based on their expertise. Site team members, through the CCE staff and Team Chair, may request documentation from the program to prepare for the visit.

Other facets of the visit are the same as with any other visit, i.e., team meeting day before visit, introduction briefing/exit interview, team report timetable, etc. In most instances, the CCE staff attend a focused site visit with the team, but in some instances, the Team Chair handles the logistics of the visit with close coordination with the CCE staff if any assistance is needed.

In all instances, when any type of site visit is conducted the Council Chair and/or CCE President may extend the visit length or change the size of the team due to the complexity and nature of the visit.

Appendix I – Example of Site Team Agreement Cover Letter

(Date)

Name
Title
Affiliation/College
Address
City, ST Zip

Dear (Name):

On behalf of The Council on Chiropractic Education (CCE), thank you for accepting the responsibility to serve as a team member on the scheduled comprehensive site visit to the {doctor of chiropractic degree (DC) or chiropractic residency program} at {Name of Program (Abbreviation)} from (Dates of Visit). An initial site team meeting is scheduled (Day) evening, (Date of meeting) at 6:00 pm. The CCE Administrative Office will provide further details about the meeting in the weeks ahead.

Please arrange for your airfare reservations immediately to take advantage of possible discount airfares. Enclosed is a Site Team Member Agreement Form, please sign and or email the agreement to name@cce-usa.org **as soon as possible**.

(CCE Administrative Office Name/Title), will be accompanying the team for this site visit to provide assistance to the Site Team Chair and team members. The site team assessment and report will be based upon on-site verification of the self-study report submitted by the program and other evidence gathered during the site visit. The CCE Standards and CCE Manuals are to be used by the team in evaluating the program's self-study report, and preparing the site team report. CCE publications are available on the CCE website and on the CCE MyCloud, (see *Public* folder).

Upon receipt of your signed agreement to serve form, you will receive an email with instructions to access the CCE MyCloud for the program's self-study report and additional site visit documents, such as the Team Report Timetable, Site Visit Team Member List, and Site Visit Assignment Matrix.

You will be reimbursed for all charges directly related to your service, including travel, transportation, hotel accommodations and meals. For information and questions concerning the logistics of the visit, please contact the CCE Administrative Office.

You will be reimbursed for all charges directly related to your service, including travel, hotel accommodations and meals. For information and questions concerning the logistics of the visit, please contact the CCE Administrative Office.

Thank you for your continued interest in the enhancement of chiropractic education, please do not hesitate to contact the CCE Administrative Office at (480) 443-8877 if needed.

Sincerely,

S. Ray Bennett
Vice President for Accreditation & Operations

Enc: Site Team Agreement to Serve Form

Appendix II – Site Team Member Agreement to Serve (Page 1 of 2)

SITE TEAM MEMBER
AGREEMENT TO SERVE

SITE TEAM MEMBER DUTIES/RESPONSIBILITIES:

I, (Name), accept the assignment to serve as a team member for the Comprehensive Site Visit to the {doctor of chiropractic degree or chiropractic residency program} (DCP or Residency) at {Name of program (Abbreviation)}, (Dates of Visit). In accepting this assignment, I agree to uphold and abide by the confidentiality policies of The Council on Chiropractic Education (CCE), the stipulations of the Business Associate Agreement executed between the (DCP or Residency) and CCE for the site visit and any official CCE publications and manuals regarding the overall accreditation process.

I have also read and understand CCE Policy 18, Conflict of Interest, and will not serve the visited program or institution as a compensated consultant for a period of one-year following the final accreditation action.

Site Visit Activities:

Thoroughly and carefully review the submitted (DCP or Residency) self-study report, progress report and/or documentation provided by the Council in preparation for the site visit and in accordance with Council manuals and the CCE (*DCP Standards or Residency Standards).*

Review and become familiar with the Accreditation Manual, Academy of Site Team Visitors Manual and the documents and information provided by the CCE staff to ensure understanding of the responsibilities of a site team member and the importance of the site visit.

Ensure review of the Accreditation Manual, Section IV.E, Guests Observers, pp 7-8 if an observer is selected to accompany the team on the visit.

Conduct initial and follow-up interviews and meetings with program representatives in accordance with the schedule of events and/or assigned responsibilities.

Maintain review and reference to the CCE *Standards* during the entire site visit.

Review and/or inventory program policies, documents, credentials, qualifications, clinic information, admissions data, etc. as required insuring complete and accurate assessment.

Ensure all your areas of responsibility assigned by the team chair in the Site Visit Assignment Matrix are assessed and discussed by the team, as necessary, and reported appropriately with timely completion.

Work closely with the CCE staff in the timely compilation of the site team report in accordance with the Team Report Timetable and CCE policies and procedures.

Appendix II – Site Team Member Agreement to Serve (Page 2 of 2)

Site Teams shall be legally protected as follows:

CCE shall indemnify the following individuals against any judgment, costs or expenses that may be imposed on or reasonably incurred by such person in connection with any claim, action, suit or proceeding made or instituted in which such person may be involved by reason of such person having served in that capacity:

(a) any past or present Officer, agent, representative, Councilor, Committee Member, Member representative, Site Team Member, or CCE employee; and

(b) any past Director, Commissioner, Officer, Committee Member, Member representative, Site Team Member, or CCE employee.

This agreement of indemnification by the CCE shall be binding upon the CCE, its successors and assigns, and shall inure to the benefit of the heirs, executors and administrators of any such Council Chair, Councilor, Member or employee of the Council that may be entitled as a matter of law.

The indemnification herein above provided for, shall in no event be applicable in any case in which such individual shall be finally adjudged in any such action, suit or proceeding to be liable because he or she had acted fraudulently or in bad faith.

Reference: CCE Bylaws, Article XI, Indemnification

Signed:

____ ____________

(Team Member Name) **Date**

Appendix III – DCP Site Visit Assignment Matrix

Site Visit Assignment Matrix
(DCP)
(Date & Type of Visit)

CCE ACCREDITATION STANDARDS – JANUARY 2018 Edition		
Section 2 – CCE Requirements for Accreditation of Doctor of Chiropractic Degree Programs		
	PROGRAMMATIC REVIEW	**EVALUATORS**
A.	**Mission, Planning, and Program Effectiveness**	
B.	**Ethics and Integrity**	
C.	**Governance and Administration**	
D.	**Resources**	
E.	**Faculty**	
F.	**Student Support Services**	
G.	**Student Admissions**	
H.	**Curriculum, Competencies and Outcomes Assessment**	
	CCE Clinical Education Meta-Competencies	
	1. Assessment & Diagnosis	
	2. Management Plan	
	3. Health Promotion and Disease Prevention	
	4. Communication and Record Keeping	
	5. Professional Ethics and Jurisprudence	
	6. Information and Technology Literacy	
	7. Chiropractic Adjustment/Manipulation	
	8. Inter-Professional Education	
I.	**Research and Scholarship**	
J.	**Service**	
Section 3 – CCE Requirements for Institutional Accreditation (If applicable)		
	INSTITUTIONAL REVIEW	**EVALUATORS**
A.	**Incorporation**	
B.	**Legal Authorization for DC Degree**	
C.	**Legal Requirements/Jurisdiction**	

Appendix IV – Residency Site Visit Assignment Matrix

Residency Program - Site Visit Assignment Matrix
[Type of Visit] Site Visit Team
[Name of Program] [(Abbrev)]
[month, date, year]

CCE RESIDENCY PROGRAM ACCREDITATION STANDARDS – JULY 2017 Edition	
Section 2 – CCE Requirements for Accreditation of Residency Programs	
PROGRAM REVIEW:	EVALUATORS:
A. Mission/Purpose, and Program Effectiveness	
B. Ethics and Integrity	
C. Governance and Administration	
D. Facilities and Resources	
E. Faculty	
G. Resident Support Services	
F. Resident Selection	
H. Curriculum, Clinical Training, and Competencies	
1. Clinical Service	
2. Advanced or Focused Healthcare Knowledge	
3. Practice-Based Learning and Improvement	
4. Interpersonal and Communication Skills	
5. Professionalism	
6. Collaborative Practice	
7. Evidence-informed Advanced or Focused Practice	
I. Duty Hours	
J. Completion Designation	

Appendix V: Example of Team Report Timetable

TEAM REPORT TIMETABLE

(Program)
(Dates of Visit)

(Date)
Exit Interview (Last Day of Visit)
Site Team Chair and team members meet with the program President/CEO, and any administrative staff or others the program President/CEO wishes to have present, at which time the Site Team Chair provides an oral presentation regarding any strengths and/or concerns with recommendations.

(Date)
Draft Report Assembled (Last Day + 5 days)
Site Team Chair and CCE Administrative Office staff assembles the draft site team report and distributes to all team members for their review.

(Date)
Team Members Respond (Last Day + 11 days)
Team members review draft site team report and provide edits to Site Team Chair and CCE Administrative Office staff. Site Team Chair approves draft site team report for distribution.

(Date)
Draft Report (Last Day + 15 days)
CCE Administrative Office staff sends draft site team report to program President/CEO for review of Corrections of Errors in Fact.

(Date)
Corrections of Errors in Fact (Last Day + 22 days)
Corrections of Errors in Fact are sent from the program to the Site Team Chair and CCE Administrative Office. Site Team Chair approves final site team report for distribution.

(Date)
Final Report (Last Day + 27 days)
CCE Administrative Office staff sends final site team report to program President/CEO, Accreditation Liaison, program Governing Board Chair, Site Team Members and Council Chair.

(Date)
Program Response (Last Day + 55 days)
Response to the final site team report is sent from the program to the CCE Administrative Office for distribution to the Council.

NOTE: Due dates that fall on a national holiday or weekend are extended to the next business day. The program Response to the final site team report must be at least 30 days prior to the Council Status Review Meeting in accordance with CCE policies and procedures.

Appendix VI – DCP - Onsite Document Requirements (sent to DCP in advance of visit)

The DCP must make the following documents available on site for review by the team (Column B). Provide a listing and/or table of contents of all documents (paper copies or electronic) in the team room, with the location of each document clearly identified. Additionally, at the time of the site visit please provide the most current data/reporting for items indicated in the table below.

		A	B
	Documents:	**Provided in the SS Report: (Ref Attachment)**	**To provide in the Team Room:**
1.	Program self-study report, exhibits and update report (if applicable).		
2.	Materials pertaining to the program planning; planning goals and objectives including processes, timelines, performance results, data and analysis, and ties to resource allocation and or budgeting.		
3.	Programmatic and institutional effectiveness processes and reports; including metrics for academic and non-academic operations, established thresholds, and data and analysis, and ties program improvement and planning processes.		
4.	Most recent posting of NBCE scores in accordance with Policy 56, (see *Student Performance Data Tables*). Additionally, provide NBCE licensing exam results and respective registrar data, for the most recent four years to enable the site team to verify the NBCE performance rate.		
5.	Current DCP completion rate in accordance with Policy 56, (see *Student Performance Data Tables*). Additionally, provide the respective registrar data, for the most recent two years to enable the site to verify the completion rate calculation.		
6.	Organizational charts		
7.	Institutional policies and governing board bylaws		
8.	Governing board meeting minutes with regard to BOT approval and/or review of the mission, budgets, planning, academic program assessments, etc., for the two (2) most recent years.		
9.	Current Fiscal Year budget document and other materials pertaining to the budgeting process		
10.	Current financial audits (last two years and management letters)		
11.	Other published financial reports, i.e., Financial Aid, etc.		
12.	Faculty manual or collective bargaining agreement; faculty policies and procedures (workload, evaluations, rank and promotion, development, committees, etc.)		
13.	Listing of faculty members with associated titles and credentials, current courses taught, and associated credit hours taught in the DCP.		
14.	Catalog (electronic or hard copy)		
15.	Student Handbook and Student Code of Conduct		
16.	Student complaint policies/procedures. Record of student complaints.		
17.	Published admissions requirements and other admissions policies, e.g. AATP policy (if applicable), transfer of credit, financial aid, scholarships, refunds, international students)		

18.	If the DCP admits AATP students, evidence of tracking and monitoring academic progress, and providing appropriate academic support services, (see CCE Policy 7 requirements).		
19.	If the DCP admits AATP students, evidence of tracking and monitoring academic progress, and providing appropriate academic support services, (see CCE Policy 7 requirements).		
20.	Most recent Program Enrollment Admissions Report (PEAR), including an analysis of academic performance of AATP students.		
21.	Clinic handbook(s)		
22.	A curriculum map or similar representation that displays where topics related to the various the meta-competencies are presented, (i.e. where meta-competency curricular objectives). Course syllabi to verify curriculum map/where curricular objectives are taught.		
23.	An assessment plan to measure student learning and achievement of the meta-competency outcomes, including assessment methods and tools, thresholds, data and analysis. Provide copies of the assessment forms.		
24.	Data/evidence that demonstrates individual student achievement of the meta-competencies outcomes prior to graduation.		
25.	Evidence that the program utilizes a formal system of quality assurance for patient care that includes performance measures/criteria and establish performance thresholds; subsequent QA data and analysis, and examples that demonstrate the results are used to inform improvements.		

26.	Eligibility documents as evidence of compliance with the requirements for accreditation, in accordance with CCE Standards, Section 1.II.B.2 and as listed in Section 1.II.A.2, items a thru i, including the most recent regional accrediting agency actions letter, which provides the current accreditation status of the institution.	

Appendix VII Residency - Onsite Document Requirements (sent to Residency in advance of visit)

The residency program must make the following documents available on site for review by the team (Column B). Provide a listing and/or table of contents of all documents (paper copies or electronic) in the team room, with the location of each document clearly identified. Additionally, at the time of the site visit please provide the most current data/reporting for items indicated in the table below.

		A	**B**
	Documents:	**Provided in the SS Report: (Ref Attachment)**	**To provide in the Team Room:**
1.	Program self-study report and exhibits/attachments		
2.	Residency program's goals and objectives, and program outcomes.		
3.	Program effectiveness documents, including measures, data, thresholds, analysis and evidence/example of how these are used to inform curricular improvements. The program effectiveness/evaluation processes include an analysis of resident competency assessment data.		
4.	Residency program and/or sponsoring organizational policies.		
5.	Organizational charts and related documents		
6.	Residency program committee meeting minutes for the most recent year		
7.	Resident handbook or catalog (or similar document)		
8.	Published resident selection requirements, policies and procedures		
9.	Residency program's faculty-clinician manual/handbook, if applicable		
10.	Residency program and/or clinic handbook(s)		
11.	Listing of faculty members with associated titles, job description		
12.	The residency program's specific outcomes for each competency, which align to the program's specific advance training focus		
13.	An assessment plan to measure the resident's achievement of the competency outcomes, including assessment methods and tools, thresholds, data and analysis. Provide copies of the assessment methods/tools.		
14.	Evidence that demonstrates each resident's achievement of all the clinical competency outcome, prior to graduation/completion of the program.		
15.	Evidence that the program utilizes a formal system of quality assurance for patient care that includes performance measures/criteria and establish performance thresholds; subsequent QA data and analysis and examples that demonstrate the results are used to inform improvements.		
16.	Eligibility documents as evidence of compliance with the requirements for accreditation, in accordance with CCE Residency Standards, Section 1.II.B.2 and as listed in Section 1.II.A.2.a-h.		

Appendix VIII: Team Room Setup Requirements (sent to program in advance of visit)

Site Team Visit - Team Room Setup Requirements

The following items/systems should be available in the team room (on campus/site):
Note: Adjust according to the number of site team members

1. Seven (7) keys to the Team Room; one (1) for the Team Chair, one (1) for the CCE Administrative Office staff and five (5) for distribution to Team Members. NOTE: Three (3) keys for Interim/Focused site visits and residency program visits.

2. One-two (1-2) computer (PC) set-up in the team room with:
   a. printer capabilities (in the team room);
   b. internet access; and,
   c. program/institution intranet access (if applicable). The computers should have Microsoft Word, Excel & Acrobat (.pdf) programs loaded.

3. Power cord/surge protector capabilities for site team personal laptops on team table

4. Internet access for all personal laptops (wireless, if applicable, also provide log-in and password)

5. Copier (easy access for team members, not required in team room)

6. One (1) telephone and phone directory of program personnel

7. One (1) dozen pens and six (6) pencils

8. Seven (7) post-it note pads
   Note: Two (2) for interim/focused/residency site visits.

9. Seven (7) pads of note paper (scratch pads 8 1/2 X 11)
   Note: Two (2) for interim/focused/residency site visits.

10. One (1) stapler

11. One (1) tape dispenser

12. One (1) three-hole punch

13. One (1) box of standard size paper clips

14. One (1) Nametag for each team member (preferably with lanyard), with no titles, program affiliations, etc.

    Name Tag Example: Dr. Chris Smith
    CCE Site Team

Appendix IX – Examples of Concerns/Recommendations, Suggestions and Commendations (Page 1 of 2)

SITE TEAM REPORT EXAMPLES

The following examples are intended to guide site teams with the formatting of *concerns/recommendations*, *suggestions* and *commendations* and provide a brief overview of the basic terms of the examples.

When identifying areas regarding the requirements for accreditation in the CCE Standards, the team must decide whether the issue:

1. is considered to be a deficiency regarding the requirements of the CCE Standards and would therefore indicate a ***concern*** and require a team ***recommendation****;* or

2. is not considered to be a deficiency regarding the requirements of the CCE Standards, but rather a need for program improvement, therefore calling for a ***suggestion*** *(but not required)*.

In basic terms, *concerns* are designed to bring immediate attention to an area that is considered to be in violation of the CCE Standards and warrants an explanation/response for consideration by the Council, while *suggestions* are designed to help the program take advantage of an opportunity to improve its process(es). *Commendations* are laudatory statements regarding areas of exemplary performance indicating program strengths, not simply good intentions

Concerns with *recommendations* and *commendations* are identified in the body of the narrative of the report and also in a summary at the end of the report. These are the only items the Site Team Chair will read in his/her oral statements during the exit interview. *Suggestions* are also contained in the body of the narrative of the report but not repeated in the summary list at the end of the report, nor identified in the exit interview.

A. Example of a *Concern* with *Recommendation*

In the body/narrative portion of the report:

1. Identify the section of the Standards relating to the *concern*.
2. Write/explain the findings of the team; to include all supporting evidence (documents, interviews, etc.
3. State the *concern*; follow with the team *recommendation* (bold/underline text, see example below).

H. Curriculum, Competencies, and Outcomes Assessment

Finding/explanation and supporting evidence in body/narrative of report.

The site team is concerned that the DCP does not demonstrate evidence of student achievement of all of the CCE meta-competency outcomes. [*Recommendation #*] The site team recommends the DCP review the identified gaps and amend the clinical assessment tools and/or assessment plan to measure all 31 meta-competency outcomes.

Appendix IX – Examples of Concerns/Recommendations, Suggestions and Commendations
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B. Example of a *Suggestion*

In the body/narrative portion of the report:

1. Identify the section of the standards relating to the *suggestion*.
2. Write/explain the findings of the team; follow with supporting information (documents, interviews, etc.
3. State the *suggestion*, following the steps above; in the narrative portion of the report (bold/italics, see example below).

At the end of each fiscal year all department-level Annual Reports are bound together to create an institution-wide Institutional Effectiveness Report. Since data, assessments, and conclusions are presented department by department, it is difficult to use the information in its current form to demonstrate that strategic objectives are being met. The site team ***suggests*** that the program consider arranging the information contained in the institution-wide Institutional Effectiveness Report by strategic objective and goal supported, rather than only by department objectives. This would not require the generation of any additional data, but would help facilitate demonstration of institutional effectiveness.

C. Example of a <u>Commendation</u>

In the body/narrative portion of the report:

1. Identify the section of the standards relating to the *commendation* (if applicable).
2. Write/explain the findings of the team; follow with supporting information (documents, interviews, etc).
3. Write the *commendation* in the narrative portion of the report (underlined only, see example below).

<u>The site team commends the program for designing and implementing a very comprehensive and objective evaluation system for both measuring and recognizing standards of performance by faculty</u>.