# 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 2025 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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# 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 CCE Administrative Office staff, site team chair (t*eam chair*), and team members before they ever arrive on campus. Letters, telephone, e-mail, and conference calls and distance technology all have their place in this planning.

The CCE staff, the program's accreditation liaison, and the team work together to plan the schedule for the accrediting visit. It is important for team members to promptly respond to CCE staff's emails and to attend all scheduled team meetings. The CCE staff 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 programs it accredits and monitor the 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 schedule to continue accreditation is on a six-year cycle. Interim reports are normally required halfway through the accreditation cycle, at year-three.

### *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/program director regarding their intentions to continue accreditation with the CCE. Once the program acknowledges their intent to continue, the CCE informs the program of the requirements for submission of their self-study report 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 selects the site team members from the Academy of Site Team Visitors (*Academy*) in accordance with CCE policies and procedures. Selections are based on Academy members' availability, absence of conflicts of interest, experience/training, and categories needed to conduct the visit. Academy members are required to complete a survey to identify their availability for upcoming site visit dates to facilitate CCE staff's selection of team members for each site visit.

When the site team is established, the president/program director reviews and signs the Team Agreement Form. 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, a recent candidate for a 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 with the accreditation process. Such a written request must be submitted to the Council Chair within seven (7) business days of the program's 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 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 program's self-study, 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 deficiencies 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, and nearby airports when making their respective travel arrangements. Typically, team members should not make return reservations before noon on the final day of the visit.

Team members are encouraged to use the most cost-efficient transportation available, as per CCE policies. In many cases, the CCE staff rent a vehicle for ground transportation. Per CCE policy, it is not permissible for team members to rent cars individually unless prior approval is obtained from the CCE President.

### *Lodging*

The CCE staff makes 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 four evenings (arriving on the day of the initial team meeting and departing on the day of the Exit Meeting). 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 so CCE staff may revise the room reservations.

### *Team Room Arrangements*

In coordination with the program accreditation liaison. the CCE staff makes arrangements for the program/college to provide a workroom for team members with refreshments, office supplies, access to Wi-Fi and a printer, etc. (see Appendix VIII).. Team members are required to bring their own laptop or device. The CCE staff and the program accreditation liaison provide support to team members in obtaining necessary items. Often, the program/college also has 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 site visit documents is provided to the program in conjunction with the Executive Summary Report (ESR). Requested documents are electronically provided in advance of the site visit (SharePoint) for review by the site team and CCE staff (see Appendix VI and VII).

## II. Site Visit Processes & Communication

The CCE staff and the site team chair 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 Staff Role*

The CCE staff serves at the direction of the CCE President and works closely and cooperatively with the team chair in matters related to accreditation site visits. The CCE staff are not reporting team members, but provide guidance on policy and procedural matters, as well as administrative support for the team. The CCE staff provides guidance to the site team regarding their assigned responsibilities on the visit, clarifies the requirements for accreditation as listed in the CCE Standards, monitors and guides consistency of processes, reviews and provides suggested revisions to the draft report compilation, and explains 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 site visit process:

a. Reviews the self-study report, completes an Executive Summary Report, 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/program director to provide information and assistance, establish site visit dates, and obtain agreements.
d. Works with the site team to convey information

in its review of the program's self-study, regarding specific areas or processes the team should address during its visit.

e. Distribute the site team evaluation 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. Provide 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. Develop the site team assignment matrix, which outlines each team member's responsibilities for assigned CCE Standards.

c. Develop the team report timetable, which outlines key due dates for the draft and final versions of the site team report.

d. Maintain communication with the program accreditation liaison prior to and during the visit and through the Council status review meeting regarding the visit.

e. Coordinate 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. In conjunction with the team chair, ensures 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 the draft site team report.

g. Format and distribute drafts and final reports to team members, the program, and the Council in accordance with the Team Report Timetable.

**Activities for the Site Team Visit**

a. Communication
   1) Copy the team chair on all email correspondence with the program and team members.
   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) Share necessary documents with the program accreditation liaison regarding the site visit details (i.e., arrival date/time, lodging, meals, meeting schedule, and subsequent activities).
   2) Provide the site team with the necessary site visit information (i.e., program contact information, transportation arrangements, arrival date/time, lodging, meals, location and date/time of team meetings, and any other activities the team should be aware of prior to arrival).
   3) Reserve hotel rooms for the team.
   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 provides the requested documents as outlined in the required site visit documents listing (Appendix VI & VII) and equips the team room as outlined in the team room setup requirements (Appendix VIII).
   7) Arrange for meeting space availability at the hotel for the daily team meetings.
   8) Prepare the site team report template based on the team assignments and CCE Standards, as applicable to the visit, and provide it to the site team.
   9) Ensure site team requested documents or materials are provided to team members as requested.

c. During the visit:
   1) Utilize applicable CCE *Standards*, the current edition of the CCE *Manual of Policies*, CCE *Accreditation Manual,* and any other accreditation-related documents (A.4, G, H.3 worksheets, etc.).
   2) Provide the team members with the schedule of meetings.
   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. The chair may have limited areas of responsibility regarding report writing assignments based on the experience of other team members and/or Council requirements. However, responsibility for overall report completion is required. While responsible for the 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.
b. Assist in the organization of site visit activities with the CCE staff; assist site team members in preparation for and during accreditation visits; and interact with the president/program director during the visit.
c. Review the site team assignment matrix with team members and adjust assignments of responsibilities, if necessary and in conjunction with CCE staff, based upon the 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 CCE (program changes requiring review, per Policy 1, etc.).

**Experience, Education and Training:**

a. Recommended by Council Site Team Academy Committee and/or CCE staff.
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. Experience in higher education preferred, but not required.
f. Attendance at Academy training and/or workshops.

**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, accreditation 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 the 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 and the program's electronic documents are available as needed during the visit.
        (c) A 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.
        (e) The schedule of team meetings and on-campus meetings is distributed to team members and the program accreditation liaison.
    2) Utilize the Site Team Chair Guide to establish the agenda for the initial team meeting, i.e., 6:00 p.m. on the evening before the Introduction Briefing.
    3) Require team members to review the *CCE Standards*, CCE *Accreditation Manual,*

*Academy of Site Team Visitors Manual*, and all related CCE *Policies*.
4) Utilize the Site Team Chair Guide to establish the agenda for the first meeting (Introduction Briefing) with the president/program director 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 their findings each evening, for timely completion of the team's evaluation and team report.
5) Facilitate team discussions and ensure 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 (ESR) and a list of required site visit documents are sent to the program, notifying the program of any additional requirements and whether a self-study update is optional or required. The ESR provides feedback to the program regarding the content and format of the self-study. The program reviews the ESR and takes appropriate action. The program provides the required site visit documents and update report (if warranted) to the CCE Administrative Office no later than 30 days prior to the site visit.

The CCE staff then forwards the self-study, required site visit documents, and update report, if applicable, to the assigned site team for their review prior to the site visit. The Council is provided with 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 approximately three 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. Team members may request additional information from the program prior to the visit; this must be coordinated with the CCE staff and team chair during the site team's pre-visit conference call. The CCE staff will forward requests to the program with instructions to provide additional information either prior to the visit or make it available on the first day of the visit, as determined by the team.

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 required site visit documents listing (Appendix VI-VII), 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 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; 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 and receipts to the CCE Administrative Office within ten (10) days after the visit has concluded. An electronic copy of the Travel Expense Report is provided to team members and is available on the CCE website. CCE Policy 94, Expenses, Stipends and Honoraria, is provided in the CCE Manual of Policies and is 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 "what to do" and "what not to do" 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 required site visit documents listing (Appendix VI & VII), which informs the program what documentation ***must*** be made available to the team prior to or during the site visit, if not already provided in the self-study. This list is not all-inclusive, the team may need additional information as required by the CCE *Standards*, CCE policies, and/or following their review of the self-study documents.

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.

### *Initial Team Meeting*

The initial team meeting normally is scheduled at 6:00 p.m. on 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 ask any questions regarding 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. Brief team on expense report procedures.
e. Review the role of the team chair and CCE staff.
f. Review overall team responsibilities.
g. Review the roles of individual team members, including specific individual assignments.
h. Review the role of observers if any are present.
i. Review the meeting schedule (introduction meeting, individual interviews, team meetings, open-door discussions with program constituents, exit interview, etc).
j. Relay any special information regarding location of materials, facilities, or personnel.
k. Discuss preliminary impressions of self-study, update, and any ancillary documents provided.
l. Discuss any specific directions from the Council.

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. There is limited time to meet with the program personnel, request and review documents, so the team chair must keep the team on task.

b. Emphasize teamwork. The team discusses their evaluation of the program and writes the report in consensus, in which all team members have ownership.

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

d. Maintain contact and communication with the president/program director, who is probably anxious and shouldn't be surprised by 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 president/program director 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 and the CCE staff to review the 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 regard to each *Standard*, so the team chair and CCE staff should ensure that assignments are clear.

The CCE staff prepares the introduction section of the report in advance of the visit, which includes historical accreditation and process information for the program. The CCE staff may solicit additional information from the team to complete this section.

Although individual team members are responsible for specific sections of the report, they participate in the evaluation of all Standards during the site visit. The site team works closely as a unit and supports the overall responsibilities of the team.

Group meetings, i.e., faculty, students, etc, are just as important as individual interviews. Team members must attend these meetings, if they are not scheduled for concurrent meetings. The team chair utilizes the Site Team Chair Guide to provide an opening statement, which outlines the purpose of the meeting and ensures these meetings stay on track.

Site teams may include members with little experience. In these instances, the CCE staff and/or team chair take the extra time necessary to prepare these individuals for the visit and coach/train them as necessary. Typically, inexperienced team members are paired with experienced team members for training purposes. Some experienced team members may be assigned additional tasks, and/or shadow the team chair for training purposes as a future team chair.

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

### *Meeting Schedule*

In conjunction with the program accreditation liaison, the CCE staff and the site team develop the schedule of meetings 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 review the schedule prior to the visit. After they have reviewed the program self-study, they may provide the CCE staff with requests for additional meetings, as necessary, prior to (e.g., during the team conference call) or during the visit.

The schedule is distributed to all team members the evening before the first day of the site visit, during the team meeting, with any edits that may have occurred during the review process. The program accreditation liaison is provided with a copy of the schedule (prior to the team's arrival) for distribution to program representatives. 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 maintains the master schedule and utilizes it as the record of all persons/groups interviewed (names, titles, etc.), facilities visited, and procedures/activities directly observed.

### *Campus Tour*

The scheduling of a campus tour is left to the discretion of the team chair and/or CCE staff. The tour is not mandatory, and some team members may not wish to participate in the tour based on their team assignments.

### *Introduction Briefing*

The site visit begins with an introduction meeting on the first day at 9 a.m. with the president/program director and his/her representatives.

At this meeting, the team chair provides brief remarks on the purpose of the visit and introduces the team members and CCE staff. The team chair also takes this opportunity to explain the role of any observer that may be accompanying the team, based on the type of observer, i.e., USDE or CHEA representative, Councilor, or Academy Member in training. As presented in the team chair guide, the team chair explains to the program that team members are assigned to various Standards and will meet with program representatives as outlined in the schedule. If additional meetings are needed, the team and CCE staff will work with the program to add or adjust meetings, as needed.

## *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 ensures the schedule provides this information. At his/her discretion, the team chair may have a working lunch 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 a.m. to 4:30 p.m. 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 p.m., the team discusses progress made, any issues that need the CCE staff or team chair assistance, and initial impressions. Questions are openly discussed, and a plan for action is developed. The team discusses the questions that need to be addressed, documents that need to be requested, and additional meetings that need to be added to the schedule. Team members may work in the team room or in their own rooms.

On the last evening of the visit, the team discusses and writes any commendations and/or deficiencies *in preparation for the Exit meeting*. The CCE staff guides the team's review of relevant requirements within the Standards and consistent evaluation processes.

Prior to departure, the team provides their draft sections of the team report to the CCE staff and team chair. Following the visit, the team and CCE staff will spend additional time editing the report, ensuring that it addresses all the Standards, uses the correct reporting format, and is grammatically and procedurally correct. The site team is responsible for completing final versions of their draft report sections and providing these to the CCE staff and team chair, in accordance with the team report timeline.

### *Making decisions*

Consensus among team members is the goal. Nonetheless, on some occasions, team members may disagree regarding deficiencies and commendations. In these situations, it is important to reflect on the Standards and Academy Training. The team chair and the CCE staff should lead the team to a decision all members can support.

### *Exit Interview*

The team chair, site team members, and CCE staff meet with the president/program director, and any others the program wishes to have present. As a courtesy, the team chair and CCE staff also meet privately with the president/program director prior to the exit interview to discuss the visit in an open dialogue and provide context for any identified deficiencies and/or commendations.

Prior to the exit meeting, the team chair and CCE staff meet with the president/program director to discuss and determine what type of exit meeting will occur at the end of the visit. In all instances, the team chair and president/program director agree to the format of the exit interview in one of the below examples:

a. Open forum; oral presentation of deficiencies and commendations, and open discussion about the process only (no questions relating to findings); or

b. Standard format (site team and selected program reps), verbal presentation of deficiencies and commendations only.

The team chair conducts the exit interview per the guidelines in the CCE Accreditation Manual, Section VI.I, Exit Interview with program. These guidelines include:

a. Provides opportunity for the president/program director 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., deficiencies and commendations.
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 and the Council.
f. Presents, without further review, verbal statements regarding any *deficiencies* and *commendations* 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 site visit allows 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. Meetings may vary based on the type of site visit (comprehensive, interim, or focused).

Team members should reference the CCE Accreditation Manual, Section VI.E, Meeting Schedule, and Meetings/Interviews with Program Personnel, which provides guidance for the interview and meeting processes by identifying each Standard, 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 "dos" 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 the program's schedule.
- Communicate with one another; be open and transparent with team members and the 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.
- Be well-prepared, review the questions you have and who they should be directed to.
- Be pleasant, polite, courteous to a fault (invited guests); remember, this is a collegial process meant to assist programs in advancing quality education.
- Be fair, impartial, unbiased, neutral.
- Be diligent and thorough.
- 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 may 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 and the availability of the clinic director. Time should be allowed for meetings with the students (interns) and the clinic director, and review of patient records, (if not electronic). Due to 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 the program's required 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 and CCE staff are 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 CCE staff compile the composite report and ensure the accuracy of the summary listing of any *commendations* and *deficiencies*. 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 areas that do not meet the Standards are addressed as *deficiencies*, and program strengths as commendations. The report is to be clear and constructive to improve the program. The evidence used to arrive at such conclusions must support any evaluative statements.

The report clearly describes any deficiencies. 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 example 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 deficiencies must be accompanied by a *Standard* reference, a detailed explanation of the deficiency, and evidence (or lack thereof) that supports the deficiency.

The c*ommendations* and statements of *deficiencies* in the report are parallel to the summary statements given by the team chair at the exit meeting. All *deficiencies* and *commendations* are underlined in the report.

The team chair and CCE staff must ensure that reported *commendations* and *deficiencies* are firmly grounded in the requirements for accreditation in the CCE *Standards* and are adequately supported in the team report 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 meeting 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 Team Report Sections*

Team members are responsible for drafting one or more sections of the team report. Writing is to be clear and specific, emphasizing:

a. Qualitative assessment of the program's activities and outcomes in relation to the CCE Standards.
b. Commendations, including Standards references.
c. Deficiencies, including Standards references and supporting evidence.

### *Final Draft of the Team Report*

Prior to the conclusion of the visit, the CCE staff and team chair must receive (via email or uploaded to the document management system) draft sections from each team member addressing all components of the site team report <u>in accordance with the site visit assignment matrix and the team report timetable</u>.

During the two weeks following the site visit, the site team, team chair, and CCE staff review and edit the draft team report through a secure document management system (SharePoint, Google Docs, etc.). During this period, it is essential for team members to follow the due dates outlined in the team report timetable and respond to emails from the team chair and CCE staff regarding edits to the team report.

### *Nature of the Report*

**a. The site 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 deficiencies related to the requirements within the Standards and avoid areas 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* <u>*not*</u>:**

1) Include unverified information, assumptions, or unsupported generalizations.
2) Include first-person statements or personal references to team members or program personnel within the narrative the 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."

### *Deficiencies*

The program is obligated to comply with the requirements for accreditation of the CCE *Standards*. Identified deficiencies must be stated in terms of the type and amount of evidence examined, and the related component of the Standard must be specifically cited. Stated **deficiencies** 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 **deficiency**.

### *Commendations/Strengths of the 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 *deficiencies* 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 five 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 edits to the team chair and CCE staff.
b. Within four days of the team member's response, the team chair and the CCE staff assemble the final version of the draft report, and the CCE staff sends it to the program with the Corrections of Errors of Fact Letter.
c. Within seven days of receipt of the letter, the program responds to the CCE staff and team chair with correction of errors of facts. 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 submitted to the CCE staff.

a. Within five days of receipt of the corrections of errors in fact, the CCE staff sends a cover letter and an electronic version (via email) of the final report to the president/program director and Accreditation Liaison. An electronic version of the report is also sent to the site team members (including the chair). This normally occurs within four weeks of the conclusion of the site visit.

b. The CCE staff also sends a copy of the cover letter to the 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 site team report. 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. The program *must* respond to any deficiencies identified by the site team and insert the program's response at the appropriate places within the report narrative. Proper documentation (attachments) must support and clarify the program's response.
b. Updated ancillary documents and/or new evidence must also be attached to the response if applicable.
c. The narrative of any response to the site team report must also describe any major program changes as related to the deficiency and provide updated outcome data since the site team visit.
d. 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).
e. The team report then becomes the property of the program.
f. 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 the Program's Response to Final Team Report***

The CCE staff and Council review the program's 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 continued accreditation of the program, 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 instructs 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 focused on monitoring specific requirements in the *Standards* and provide an opportunity for dialogue with the program and the Council. At the discretion of the Council, interim visits are normally scheduled at the midway point of the eight-year accreditation cycle in accordance with CCE policies and procedures. 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 (including 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 for the site visit and requires an *Interim Site Visit 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 additional documentation prior to the visit, or have the information available for review during the site visit, 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/exit meetings 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 deficiencies needing follow-up. In addition, focused site visits may be required for a substantive change. Generally, two to three team members (including 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 meeting on the third day.

A self-study is not required from the program; rather, the program submits a Progress Report to address the deficiencies identified in the Council letter. The specified deficiencies are the focus of this visit. 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, following their review of the Progress Report.

Other facets of the visit are the same as with any other visit, i.e., team meeting day before visit, introduction/exit meetings, team report timetable, etc. In most instances, the CCE staff attend a focused site visit with the team, 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.

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 accompany the team for this site visit to assist 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 team will use the CCE Standards and CCE Manuals to evaluate the program's self-study report and prepare the site team report. CCE publications are available on the CCE website.

Upon receipt of your signed agreement to serve form, you will receive an email with instructions to access the CCE SharePoint for the program's self-study report and additional site visit documents, such as the team report timetable, site team assignment matrix, and team report template.

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.

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,

Jeannette Danner, MS
Director of Accreditation

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 meeting schedule 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 2025 | | |
|---|---|---|
| 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. | Administration | |
| D. | Resources | |
| E. | Faculty | |
| F. | Student Support Services | |
| G. | Student Admissions | |
| H. | Curriculum, Competencies and Outcomes Assessment | |
| | CCE Clinical Education Meta-Competencies | |
| | Quality Patient Care | |
| I. | Research and Scholarship | |
| J. | Distance or Correspondence Education | |
| | | |
| | | |

**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 – January 2025** | |
|---|---|
| **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** | |
| **F. Resident Support Services** | |
| **G. Resident Selection** | |
| **H. Curriculum, Clinical Training, and Competencies** | |
| **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 president/program director, and any administrative staff or others the president/program director wishes to have present, at which time the site team chair provides an oral presentation regarding any strengths and/or deficiencies 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 president/program director 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 president/program director, 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:** Team Room Setup Requirements (sent to the 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. Keys to the Team Room
   - one (1) for **each** team member and CCE staff

2. Team member access to a printer:
   - log-in/password for team members' own devices, or

   one computer set-up in the team room with printer access

3. Power cord/surge protector for CCE site team's and staff's personal laptops (6-8) on team room table

4. Secure Wi-Fi access
   - provide log-in and password information and instructions

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

6. pens and pencils, post-it notes, and pads of paper

7. Nametag for each team member (preferably with lanyard)

   Name Tag Example: Dr. Chris Smith
   CCE Site Team

**Typically, the college provides snacks and beverages in the AM and PM in the Site Team Room, e.g., coffee, tea, water, juice, pastries, chips, nuts, etc.**

**If the college campus does not have a cafeteria, please arrange to order take-out lunches for the site team each day.**

**Appendix VII –** Example Deficiencies and Commendations
(Page 1 of 5)

Deficiencies and commendations must be tied to the relevant required component of a CCE Standard. In addition, the team report narrative must include the team's rationale for the identified deficiency and/or commendation. The team's analysis must be clearly stated and provide sufficient description of specific evidence to support the deficiency and/or commendation,

Deficiencies and commendations are the only items the site team chair will read in his/her verbal statements during the exit meeting with the program. Therefore, the team cannot modify, add, or omit deficiencies and commendations in the team report after the exit meeting has occurred. However, the team is allowed and encouraged to develop their rationale, analysis, and description of evidence that supports the deficiencies and/or commendations during the editing phase of writing the draft team report.

Deficiencies and commendations are identified in the body of the report and a summary listing at the end of the report.

- The full text of a Commendation is underlined.
- The full text of a **Deficiency** is underlined and in bold-face type.

The following examples are intended to guide site teams in formatting *deficiencies* and *commendations* in the team report.

**A. Instructions and Examples of a *Deficiency***

In the body/narrative of the report:

1. State the *deficiency* using bold and underline text.

2. *Standard Citation*: Identify the requirement(s) of the Standard relating to the deficiency, including Section 2.X.X., followed by the name of the section/subsection, and lastly, listing the exact language (complete sentence(s) from the Standards that applies to the deficiency.

3. *Summary/Rationale*: In the paragraph following the Standard Citation, provide the team's rationale, analysis, and specific evidence (documents, data, interviews, etc.) to support the deficiency (or lack thereof).

   Since Standard Citations often include full sentences, they may encompass multiple components or processes with several steps. Site teams must clearly specify which required components have been met and which have not been met when describing the specific nature of a deficiency. This includes providing an analysis of the related components. Examples are provided below.

**Reference: Section 2.A.2: Planning**

| **Deficiency:** |
|---|
| This section should explicitly identify the gap that the team has identified. It should be limited to no more than two sentences in length (preferably one) and should provide the Council with a clear understanding of what the DCP is lacking. **<u>The full text of a deficiency should be underlined and in bold-face type.</u>**<br><br>**Question(s) to answer in this section:**<br>*What is the specific deficiency?*<br><br>**Example:**<br>**Deficiency #1: <u>The DCP's strategic plan does not include timelines for the achievement of planning goals and objectives.</u>** |
| **Standards Citation:** |
| This should be a direct quote from the related Standard. It must **clearly and directly** relate to the identified deficiency above." Include the reference to Section 2.X.#.<br><br>**Question(s) to answer in this section:**<br>*Where exactly is this requirement stated?*<br><br>**Example:**<br>2.A.2: The DCP's plan reflects and is an outcome of a planning process that focuses on the achievement of the DCP mission and includes timelines for the achievement of goals and objectives. |
| **Summary/Rationale:** |
| This section should briefly summarize the team's rationale, analysis, and specific evidence (documents, data, interviews, etc.) to support the deficiency.<br><br>**Question(s) to answer in this section:**<br>*What documents did the team review during their analysis of this Standard and its various components?*<br>*Which program representatives were interviewed?*<br>*For which components of this Standard were evidence lacking, and how so?*<br><br>**Example:**<br>The team verified that the DCP's planning process identifies goals and objectives in alignment with the mission and utilizes measures with targets, which are monitored and updated annually (SSR, ATCH A.2.04 DCP Strategic Plan Annual Report). To confirm this, the site team interviewed key program representatives, including the DCP Dean, members of the strategic planning committee, and institutional leadership involved in the development and oversight of the strategic plan. These interviews provided further insight into the DCP's planning process and its alignment with the program's mission. However, the team found that the DCP's strategic planning processes do not specify timelines for achieving associated planning initiatives or action steps. Without timelines, the DCP is unable to demonstrate measurable progress within a defined timeframe, monitor progress effectively, and ensure accountability in achieving its goals and objectives. |

**Reference: Section 2.H.2: Assessment of Learning Outcomes and Curricular Effectiveness**

**Deficiency:**

This section should explicitly identify the gap that the team has identified. It should be limited to no more than two sentences in length (preferably one) and should provide the Council with a clear understanding of what the DCP is lacking. **The full text of a deficiency should be underlined and in bold-face type.**

**Question(s) to answer in this section:**
*What is the specific deficiency?*

**Example:**
**Deficiency #2: The DCP's clinical competency assessment through direct observations does not use multiple evaluators to assess an intern's performance.**

**Standards Citation:**

This should be a direct quote from the related Standard. It must **clearly and directly** relate to the identified deficiency above." Include the reference to Section 2.X.#.

**Question(s) to answer in this section:**
*Where exactly is this requirement stated?*

**Example:**
2.H.2: Best practices are employed to assess and demonstrate achievement of meta-competency outcomes. Assessment of clinical competency must include frequent direct observations by multiple qualified evaluators.

**Summary/Rationale:**

This section should briefly summarize the team's rationale, analysis, and specific evidence (documents, data, interviews, etc.) to support the deficiency.

**Question(s) to answer in this section:**
*What documents did the team review during their analysis of this Standard and its various components?*
*Which program representatives were interviewed?*
*For which components of this Standard were evidence lacking, and how so?*

**Example:**
The site team identified a deficiency with Standard 2.H.2, which requires using best practices to assess meta-competency outcomes, including frequent direct observations by multiple qualified evaluators. While the DCP employs several commendable best practices in its clinical assessment plan (SSR, ATCH H.2.03), such as the use of multiple assessment strategies, remediation processes, and inter-reliability training for evaluators, the program does not adhere to best practices regarding the use of multiple evaluators for direct observation assessments.

The site team reviewed the Clinic Manual (SSR, ATCH H.2.09) and interviewed key program representatives, including the Director of Clinical Education, clinic mentors, and faculty-clinicians

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| directly involved in the assessment of student-interns. The team also met with members of the DCP's academic leadership, including the Dean and the Director of Assessment, to better understand the structure and rationale behind the current clinical assessment model. These interviews provided insights into how the program implements its clinical assessment plan, including the assignment of a single clinic mentor to each student-intern for the duration of the clinical sequence.<br><br>Currently, the clinic mentor evaluates student-interns' performance in meta-competency outcomes (MCOs) using required assessment methods such as Clinical Skills Assessments (CSAs), Comprehensive File Reviews (CFRs), and Global Assessment Ratings (GA). Additional evaluators, such as the Director of Clinical Education, assess completed Electronic Clinical Case Studies (ECCS), and pre- and post-clinic OSCEs are administered by other clinicians. However, all direct observation assessments in the clinical environment are performed exclusively by the assigned clinic mentor. The use of multiple evaluators is critical for ensuring a more robust and comprehensive evaluation of clinical competency, mitigating potential subjectivity, and aligning with best practices. |

**B. Instructions and an Example of a** Commendation

In the body/narrative of the report:

1. State the C*ommendation* using underlined only.

2. *Standard Citation*: Identify the requirement(s) of the Standard relating to the *commendation*, including Section 2.X.X., followed by the name of the section/subsection, and lastly, listing the exact language (complete sentence(s) from the Standards that applies to the commendation.

3. *Summary/Rationale*: In the paragraph following the Standard Citation, provide the team's rationale, analysis, and specific evidence (documents, data, interviews, etc.) to support the commendation.

   Since Standard Citations often include full sentences, they may encompass multiple components or processes with several steps. Site teams must clearly specify which component(s) are commendable and describe the specific nature of the commendation. Examples are provided below.

**Reference: CCE Accreditation Standards, Section 2.A.3: Program Effectiveness**

| **Commendation:** |
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| This section should explicitly identify the program strength that the team has identified. It should be limited to no more than two sentences in length (preferably one) and should provide the Council with a clear understanding of how the DCP exceeds the requirement of the Standard. The full text of a Commendation should be underlined**.**<br><br>**Question(s) to answer in this section:**<br>*What is the specific commendation/strength?* |

**Example:**
Commendation #1: The site team commends the DCP for the rapid development and implementation of a culture of assessment, allowing for the collaborative use of data to drive meaningful quality improvement cycles.

**Standards Citation:**
This should be a direct quote from the related Standard. It must **clearly and directly** relate to the identified commendation above." Include the reference to Section 2.X.#.

**Question(s) to answer in this section:**
*Where exactly is this requirement stated?*

**Example:**
2.A.3: Results are tracked, disseminated internally, and analyzed in a timely fashion, to support data-informed decision-making for program improvements and program planning.

**Summary/Rationale:**
This section should briefly summarize the team's rationale, analysis, and specific evidence (documents, data, interviews, etc.) to support the commendation.

**Question(s) to answer in this section:**
*What documents did the team review during their analysis of this Standard and its various components?*
*Which program representatives were interviewed?*
*For which components of this Standard did the DCP demonstrate performance above and beyond the requirement of the Standard?*

**Example:**
The DCP has rapidly developed and implemented a strong culture of assessment that fosters the collaborative use of data to drive meaningful quality improvement cycles. The site team verified that the DCP's Assessment Committee plays a central role in consistently collecting, analyzing, and disseminating meaningful data to guide informed decision-making. This process includes thoughtful, detailed analyses such as CORE reports (SSR, ATCHs A.3.05-A.3.11), which provide valuable insights into program performance and effectiveness. The DCP has established internal benchmark thresholds across its program effectiveness measures and shares achievement data with stakeholders on a regular basis to ensure transparency and collaboration.

The site team reviewed the DCP's CORE reports and Annual Program Effectiveness Report (SSR, ATCH A.3.04) and interviewed key program representatives, including members of the Assessment Committee, the Director of Assessment, the Director of Clinical Assessment, the Dean, and other academic leaders actively engaged in program evaluation and planning. Faculty members were also consulted to ensure their understanding of how data is communicated and used to identify areas for improvement. Stakeholders consistently highlighted the benefits of the 2023-24 PE workshops (SSR, ATCHs A.3.17-A.3.21) in enhancing their ability to use data effectively for program improvements. They also emphasized that program effectiveness data is regularly shared with faculty and administration, fostering collaborative discussions and supporting evidence-based decision-making to drive meaningful changes. The team observed a comprehensive, systematic approach to monitoring program metrics, analyzing trends, and implementing targeted changes to improve program quality and guide the DCP planning initiatives. This robust, transparent, collaborative approach reflects the DCP's commitment to using assessment data to advance program effectiveness and program planning.