Evaluation Team Chair
Training

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Responsibilities of the Team Chairperson
There are four major steps and responsibilities:

- Preliminary step
- Preparation for the visit
- Coordination of the team’s activities during the visit
- Follow-up activities after the visit
Requirements for Team Chair

- The chair is an experienced leader in higher education.
- The chair has served on several evaluation team visits.
- Normally, the chair has attended a chair workshop.
Preliminary analysis

- Once the self-study material is received, the chair and the TRACS Staff will determine if a visit by the chair is required prior to the team visit and will determine if the evaluation team visit should proceed.

- Issues to be considered in this decision: faculty, financial stability, programs, library, student services, physical plant, and administrative control/administration.
Preliminary Decision

- If any one of the issues is not sufficiently clarified in the self-study, then a chair visit will be required!
Preparation for the visit

- Make sure that the president or accreditation liaison has completed all assignments in preparation for the visit.

- Upon reception of the names of the team members and date of the visit, establish communication with each team member to verify the date of the visit, to verify the arrival and departure times, and to establish that all self-study materials have been received.
Preparations continued

- Review the materials submitted by the institution and verify that each team member has received the materials
- Encourage each team member to read the self-study and start writing the report
- Request questions from team members
- Contact the chair of any other agency involved in the visit
- Confirm with the institution and TRACS Staff the visit logistics
Preparations continued

- Request any additional information needed from the institution
- Plan in conjunction with the TRACS Staff the daily schedule – follow the general format suggested by TRACS
Coordination of the team’s activities during the visit

- Schedule the flight in order to arrive early ahead of the remainder of the team in order to confirm that the necessary arrangements have been made.
- Obtain a list of the hotel room assignments and communicate to the team members the location of the first meeting.
- Visit the institution, if possible, prior to team arrival to view the documents’ room for readiness, to confirm availability of computer and printer in the workroom, and to interact with the individual who will type the report.
Coordination continued

- The staff representative will arrive early and work with the team chair.
- Hold an orientation meeting the afternoon of the team arrival in order to organize the team and make specific assignments.
- Conduct the team training session.
- Provide the team a suggested schedule for the visit.
Coordination continued

- Make sure the needs of the team are taken care of during the visit.
- Keep the team on a strict schedule.
- Act as the team spokesperson in all matters pertaining to policy, procedures, and institutional relations.
- Receive individual reports, edit final report, and file the report with the TRACS staff person.
Coordination continued

- Conduct the final team meeting to complete the evaluation forms.
- Prior to the exit interview, the chair and staff person should meet with the president to inform him of the major points of the team findings. *The team recommendation should not be given to the president or anyone!*
- Lead the exit interview.
Follow-up activities after the visit

- Provide a letter to the President of TRACS specifying the visiting team’s recommendation for action by the Accreditation Commission.
- Submit a rough draft of the report to the institutional president.
- Send a letter of appreciation to each team member.
- Provide the TRACS Commission Readers information as requested.
First Orientation Meeting

- This meeting should occur on the afternoon as the team arrives. It normally is around 4:00 p.m.
- During the meeting, the Chair conducts a short devotional to focus the team’s responsibility, review the proposed team schedule, review the team members’ individual responsibilities, and conduct a team training session.
Orientation continued

- Emphasize that the institution is responsible for complying with the narrative portion of the Accreditation Manual as well as the standards, criteria, and IERs.

- In the meeting team members should identify areas of perceived non-compliance.

- Use the benchmarks as a basis for writing the report.

- Recommendations, suggestions, and commendations should be developing.
Orientation continued

- **Recommendations** are what an institution must do to be accredited; they are tied directly to TRACS Standards.
- **Suggestions** are helpful hints, but are not mandatory for accreditation.
- **Commendations** are outstanding fulfillment of the standards.
Efforts should be made to combine areas that readily lend themselves to be listed in one recommendation, suggestion, or commendation to eliminate duplication.
The Report

- The format: title page, team, history, location, relationship to TRACS, the visit, appreciation, and the team report that addresses the foundational and operational standards (each section in order).
- Each accreditation area is addressed with narrative that describes the findings compared to the standards and criteria and IERs.
- The narrative should contain information that leads to the recommendations, suggestions, and commendations.
Please ensure!

1. Each major standard and criteria is adequately addressed in the report.
2. Recommendations are criterion-referenced.
3. Keep the team focused.
4. The visit should have a positive tone.
SUGGESTIONS

1. Keep the team and institution focused.
2. Keep the schedule moving.
3. Keep the team writing.
4. Don’t allow the institution to divert the attention from its purpose – excellent accommodations or lengthy meals.
5. Keep the team objective – every recommendation must be linked to a standard.
Suggestions continued

6. Avoid repetitive recommendations – combine when feasible and place the recommendation at the best strategic location.

7. Every recommendation must have the specific standard and criteria stated at the end of the statement.

8. Read the report for grammar, sense, and organization.
9. Every recommendation or suggestion should be based on the narrative.

10. All institutions must have a financial audit—the latest fiscal year. This includes management letters. DO NOT LET THIS SLIDE!

11. The assessment component (institutional effectiveness) should be thoroughly reviewed. The assessment component must include a plan, actively collect data, and use the data for change.
Suggestions continued

12. Institutions must have assessment data that demonstrates the institution is fulfilling its mission.

13. Institutions must address student learning outcomes – how does the institution determine students are learning.


15. Check teaching sites and/or branch campuses.
Suggestions continued

- 16. Be thorough.
- 17. The team has the ethical obligation to apply the standards and criteria at either the basic or substantive levels.
- 18. Don’t be arrogant or be a “softie”.
Thought!

- Institutions are best served when they are dealt with firmly, lovingly, and honestly in light of the standards and criteria.
Summary responsibilities

- Communicate to the evaluation team and institution.
- Read and review the material.
- Make sure the institution is prepared.
- Plan a team orientation session.
- Conduct the exit interview.
- Plan the opening dinner.
- Facilitate the schedule and interviews.
Question-Answer Time