

## Evaluation Team Chair Training

2016 TRACS Annual Conference

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## Requirements for Team Chair

- Is an experienced leader in higher education
- Has served on several evaluation team visits
- Has received chair training

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## Responsibilities of the Team Chair

- Preliminary steps
- Preparation for visit
- Coordination of team activities during visit
- Follow-up activities after visit

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**Preliminary Steps**

- Once self-study material is received, the chair and 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.
- If any one of the issues is not sufficiently clarified in the self-study, a chair visit will be required!

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**Preparation for Visit**

- Make sure that the president or accreditation liaison has completed all assignments in preparation for the visit.
- Upon receiving the names of team members and the dates of the visit, establish communication with each team member by writing a Chair Letter at least a month prior to the visit
  - to verify the date of the visit
  - to verify the arrival and departure times
  - to establish that all self-study materials have been received

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**Preparation for Visit, Cont.**

- Review 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 the visit logistics with the institution and TRACS Staff.

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### Preparation for Visit, Cont.

- Request any additional information needed from the institution.
- In conjunction with the TRACS Staff, plan the daily schedule—follow general format suggested by TRACS

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### Coordination of Team Activities

- Schedule flight to arrive ahead of the rest of the team in order to confirm that necessary arrangements have been made.
- The staff representative will arrive early and work with the team chair.
- Obtain a list of the hotel room assignments and communicate to the team members the location of the first meeting.

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### Coordination, Cont.

- Visit the institution, if possible, prior to team arrival to view the document room for readiness, to confirm availability of computer and printer in the workroom, and to interact with the individual who will type the report.
- 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.

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### Coordination, Cont.

- 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.

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### Coordination, Cont.

- Conduct the final team meeting to complete the evaluation forms.
- Prior to the exit interview, the chair and TRACS 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.

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### Follow-up Activities After the Visit

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

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### First Orientation Meeting

- Should occur on the afternoon as the team arrives, normally around 4:00 p.m.
- Chair conducts a short devotional to focus the team's responsibility, reviews the proposed team schedule, reviews the team members' individual responsibilities, and conducts a team training session.

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### First Orientation Meeting, Cont.

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

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### First Orientation Meeting, Cont.

- **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.

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## The Report

- Report format: title page, team info, history, location, relationship to TRACS, the visit, appreciation, and the team report that addresses the foundational and operational standards (each section in order).
- Each major standard and all criteria must be adequately addressed in the report.
- Each accreditation area is addressed with narrative that describes the findings compared to the standards and criteria and IERs.

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## The Report, Cont.

- The narrative should contain information that leads to the recommendations, suggestions, and commendations.
- Every recommendation must have the specific standard and criteria stated at the end of the statement.
- Combine areas that can be listed as one recommendation to eliminate duplication—place a combined recommendation at the best strategic location.

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## The Report, Cont.

- All institutions must have a financial audit from the latest fiscal year. This includes management letters. **DO NOT LET THIS SLIDE!**
- The assessment component (institutional effectiveness) should be thoroughly reviewed. The assessment component must include a plan, active collection of data, and use of data for change.
- The institution must demonstrate with assessment data that demonstrate it is fulfilling its mission.

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### The Report, Cont.

- Institutions must address student learning outcomes—how does the institution determine students are learning.
- Federal financial aid programs must be scrutinized. Note institutional default rates.

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### Suggestions

- Keep the team and institution focused.
- Don't allow the institution to divert attention from the purpose of the visit.
- Keep the schedule moving.
- Keep the team writing.
- Keep the team objective—every recommendation must be linked to a standard.
- Read the report for grammar, sense, and organization.

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### Suggestions, Cont.

- Be thorough—the team has an ethical obligation to apply the standards and criteria at either the basic or substantive levels.
  - Don't be arrogant or be a “softie.”
  - Make sure visit has a positive tone.
- Institutions are best served when they are dealt with firmly, lovingly, and honestly in light of the standards and criteria.

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## Summary of Responsibilities

- Communicate with evaluation team and institution.
- Read and review the material.
- Make sure the institution is prepared.
- Conduct team orientation session.
- Plan the opening dinner.
- Facilitate the schedule and interviews.
- Coordinate writing team report.
- Conduct the exit interview.

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