

# **Team Evaluator Manual**

*For Use with the ACCJC 2002 Standards*

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# Introduction

This Manual is designed to be used by persons serving as members of evaluation teams visiting institutions that have completed a comprehensive self study. It is intended for use with the *Guide to Evaluating Institutions*. The evaluation visit format described in this Manual is used by all institutions seeking reaffirmation of accreditation or initial accreditation.

Private non-governmental accreditation rests on a model of evaluation that involves both internal and external review of an institution. The accreditation paradigm includes the following elements:

- ❑ Standards of good practice that are accepted by the member institutions.
- ❑ Internal, comprehensive self study by the institution at periodic intervals.
- ❑ Assessment of the self study and the institution ***against the standards*** by external, peer reviewers with recommendations to the institution and the Commission.
- ❑ Decision by an independent Commission regarding the accreditation status of the institution.
- ❑ Follow-up by the institution to address the institution's own plan for improvement as well as the team recommendations identified in the evaluation processes.

The evaluation team, made up of professional peers who volunteer their services, offers independent insights based on careful analysis of the Self Study Report and on an on-site evaluation. The team:

- ❑ Evaluates the institution using the standards of accreditation.
- ❑ Confirms and finds evidence for the assertions in the Self Study Report against the standards.
- ❑ Calls attention to problem areas inadequately recognized by the college itself.
- ❑ Assures the Commission that the institution continues to meet Eligibility Requirements.
- ❑ Assures the Commission that the institution has been responsive to recommendations of previous visiting teams.
- ❑ Assures the Commission that the institution has developed sound evaluation and planning procedures to foster improvement of student achievement and student learning outcomes.
- ❑ Reinforces and extends the college's commitment to its continuing pursuit of excellence.

- ❑ Assures the Commission that the institution merits reaffirmation of accreditation or advises the Commission that the team cannot recommend such action.

The importance of these judgments in maintaining the quality of education in all institutions deserves the team's best efforts as it develops the report to the institution and to the Commission. Team members have a special responsibility to maintain the integrity of the accreditation process and outcomes which enables private, nongovernmental accreditation to meet its goals. Quality assurance to the public and institutional improvement for institutions can only be achieved through the conscious commitment of all who participate.

## The Role of the Accrediting Commission

### **Communication with the Institution**

About two years before the anticipated date of the evaluation visit, the Commission office advises the institution of the upcoming visit and self study. The college is invited to select dates for the visit and to indicate any special expertise or experience it would like represented on the team.

### **Team Chair Selection**

The Commission selects Chairs for their expertise and accreditation experience. The typical chair has experience as a chief executive officer of an institution.

### **Team Selection**

Commission staff develops the teams from a roster of experienced educators who have exhibited leadership and balanced judgment. Typically, a team has several faculty members, academic and student services administrators, a chief executive officer, a trustee, a business officer and individuals with expertise and/or experience in learning resources, distance/electronically mediated education, and planning, research and evaluation. Each evaluator is chosen to bring perspective to the task, but not as a "representative" of an organizational constituency. Teams represent the Commission.

Each team is selected to provide experienced, impartial professionals appropriate for the institution being evaluated, and to address any special concerns the college may have expressed. Colleges may ask for special expertise, but they may not request specific individuals. Teams are reflective of the diversity of the college and the region.

The size and complexity of the institution being evaluated will determine the number of persons on the team. The Commission seeks a balance of experienced and first time evaluators, and each team includes persons with experience at institutions similar to the college being evaluated.

### **Team Training**

All evaluators are required to attend a team training workshop prior to the visit. All chairs are required to attend team chair training each time they serve and are usually in attendance at team evaluator workshops with their teams.

### **Materials from ACCJC**

The Commission office sends copies of all previous team reports, any Progress Reports, and Commission action letters to the chair and team. The chair also receives the most recent Annual Report and a summary of complaints against the institution.

### **Materials from the College**

The college sends copies of the self study report, catalog, and most recent class schedule to the team members and Commission eight weeks before the visit. Some colleges will include additional materials that could inform the team about the college.

## **The Role of the Evaluator**

### **Peer Review**

The evaluation team provides an independent peer review of an institution. The team uses the accreditation standards to prepare a report for the institution's use which analyzes the adequacy of its resources, the effectiveness of its procedures, the quality of its performance in pursuit of its stated goals, and its evidence of student achievement and student learning. The team seeks to validate quality and integrity and to inspire continuous improvement of institutional performance.

The task of the evaluator is that of a colleague who shares a commitment to educational excellence by making diagnostic recommendations that improve the institution's ability to meet the Commission's standards. The evaluator looks for coherence between what the institution asserts and what evidence it provides in support of its assertions.

## **Conflict of Interest**

The Commission makes special effort to maintain the integrity of the accreditation evaluation process. To this end, evaluators are expected to disclose any possible conflict of interest before accepting an assignment. Commission policy identifies the following conditions under which an evaluator should decline an invitation to serve or ask for an assignment to another team. As prescribed by the Commission's Conflict of Interest Policy, the Commission will not knowingly invite or assign participation in the evaluation of an institution anyone who has:

- Any current or prior employment at the institution/district being evaluated.
- Candidacy for employment at the institution/district being evaluated.
- Any current or prior service as a paid consultant or other business relationship with the institution/district/system being evaluated.
- Any written agreement with an institution/district/system that may create a conflict or the appearance of a conflict of interest with the institution/district/system.
- Personal or financial interest in the ownership or operation of the institution/district/system.
- Close personal or familial relationships with a member of the institution/district.
- Other personal or professional connections that would create either a conflict or the appearance of a conflict of interest.
- Receipt of any remuneration, honoraria, honorary degrees, honors or other awards from the institution/district/system.

A conflict of interest arising from one of the relationships described above typically expires five years after the relationships ends. A team member or chair who has any questions about possible conflict of interest should contact the ACCJC President.

## **Expectations of Evaluators**

Evaluators are expected to:

- Know the ACCJC Standards, Eligibility Requirements, and pertinent policies.
- Recognize the Standards as the necessary conditions for high quality education.
- Recognize the Standards as statements of best practice in higher education.

- ❑ Understand that institutions are accredited using ACCJC Standards rather than the regulations or requirements of other groups. (See Note 1 below.)
- ❑ Appreciate that peer review lies at the heart of the accreditation process.
- ❑ Remember that team members represent the Commission.
- ❑ Maintain objectivity and flexibility.
- ❑ Rely on evidence in making judgments about the institution.
- ❑ Maintain confidentiality. (See Note 2 below.)

*Note 1*

As a voluntary, nongovernmental agency, the Commission is not obligated to exercise the regulatory control of state and federal governments, nor to apply their mandates regarding collective bargaining, affirmative action, health and safety regulations, and the like. Furthermore, the Commission does not enforce the standards of specialized accrediting agencies or other nongovernmental organizations, nor the laws and regulations of state agencies, although institutions may wish to review the publications of such other agencies as part of the self study process. The Commission has its own standards and expects that institutions and teams will apply them with integrity, imagination, and an attitude of humane concern for students and the public interest.

*Note 2*

The Commission policy on confidentiality requires that team members keep confidential all institutional information read or heard before, during, and after the team visit. Sources of information that should remain confidential include previous college and team reports; the current self study; interviews and written communication with campus personnel, students, trustees, and community members; and team discussions.

The team chair will make assignments and seek information from evaluators well ahead of the visit. It is very important that each individual prepare materials and respond quickly to requests by the team chair. Each evaluator should read the Self Study Report carefully, especially those areas in which the chair has given him or her a specific assignment.

Each evaluator should thoroughly read the historical materials sent by the Commission because they provide the accreditation background of the institution during its last cycle. During preparation, the evaluator should identify members of the college community to interview and prepare interview questions based on identified issues. Evaluators should come to the

first team meeting prepared to summarize the key issues they have identified in their areas of responsibility, present drafts of questions for interviews, and share lists of those individuals or groups to be interviewed.

The team will assess the Self Study Report as a means for determining whether the institution meets Commission Standards and for identifying potential areas for improvement. Thus, each evaluator must share concerns with the team, maintaining balance and perspective, and cross-validating when conflicting information is discovered. While it is important to listen to any member of the college community who wishes to be heard, the evaluator must distinguish between the problems of individuals and those problems that could affect learning and teaching. In short, the evaluator must be diagnostic, impartial, and, ultimately, able to make recommendations for improvement to the institution.

Evaluators are expected to arrive on time and to be present continuously for the entire visit, including the chair's oral report to the college on the final day. Team members are expected to devote their time during the visit to the assignments made by the team chair.

Although efforts are made for team members to attend a number of classes, it is not possible to visit every class or meet with every member of the faculty. Since most members of the faculty will have shared in the preparation for the evaluation visit, all should be aware of the presence of the evaluation team and have opportunities to communicate with team members.

Evaluators are expected to review the courses/programs/services offered through distance education to ensure they are characterized by the same concerns for quality, integrity, and effectiveness that apply to more traditional modes of instruction. Evaluators should also expect to visit off-campus locations where 50% or more of a program is offered.

During the visit, evaluators should give particular attention to the extent to which the college has carried out or addressed recommendations made in the most recent accreditation cycle. The college must respond to every recommendation. Evaluators should note carefully the sections in the institutional Self Study Report that describe action taken on, or responses to, earlier recommendations. The evaluator may find that there may be instances in which the college has not agreed with a team recommendation. In such cases, the college report should state the reasons for the disagreement. Evaluators should also pay attention to the college's discussion of the status of the self-identified actions plans from the previous Self Study Report. These were reported on in the college's Midterm Report to the Commission. The team should determine whether the college further considered the self-

identified action plans that resulted from its previous self study review.

The team must also verify that the college continues to meet the Eligibility Requirements, the Commission's core criteria for institutional eligibility for accreditation. Because these basic criteria must be continuously met, Commission policy requires that all accredited institutions include in their Self Study Report evidence demonstrating that they continue to meet these requirements. The Eligibility Requirements can be found in the *Accreditation Reference Handbook*.

Above all else, the evaluator should assess the institution's educational outcomes: what is happening to the students in the classroom, laboratory, and the college environment generally, and whether this is effective and in line with the institution's purposes and objectives. The team should also evaluate the institution's evidence of institutional achievement, its structures and procedures, its resources, and student achievement and learning.

### **Evaluators to Multi-College/Multi-Unit Districts or Systems**

The Commission evaluates colleges based on the Standards of Accreditation regardless of how functions are organized. However, in multi-college districts/systems, key functions related to the Standards are organized among the colleges and district/systems in many ways. In order to ensure that evaluation of all member institutions, regardless of how they are organized, is equitable, the individual colleges are the unit of analysis for accreditation and are held responsible for meeting the Standards. Nonetheless, the Commission recognizes that the district/system plays a substantial role in the institution's ability to meet the Standards and it expects that the district/system will support the colleges in this matter. The Commission's "Policy and Procedures for the Evaluation of Institutions in Multi-College Multi-Unit Districts or Systems" can be found in the *Accreditation Reference Handbook*.

Evaluators to these institutions will be supplied with an organizational "map" of the delineation of functions of the district/system and the college. This "map" will account for all major functions regardless of whether it is a college or district/system function. The map will address all Standards and reflect consultation between the college and the district/system in its development. In its self study, the college will reflect on how the district/system functions affect the college's ability to meet the standard. (The Commission expects that the Chancellor and Governing Board be involved in the development of the self study.)

As much as possible, the Commission conducts evaluation visits to institutions in multi-college district/system simultaneously so that it can

consider district/system issues when taking action on the accredited status of these institutions.

Evaluators on district/system teams may be part of a small district/system team under the direction of a Coordinating Chair selected from the team chairs involved. This team, consisting of all the team chairs plus team evaluators selected for their expertise, will meet with district/system administrators before the college visit and explicitly identify problems pertaining to the standards that are related to district/system functions. If recommendations are necessary, this team will ensure that they are included in all team reports as appropriate.

## The Role of the Team Chair

The chair organizes the evaluation visit, makes necessary arrangements for the team, speaks for the team, and writes the final team report. Prior to the visit, the chair contacts the institution and members of the team to ensure that needed resources will be available and that members are appropriately assigned. During the evaluation visit, the chair organizes team discussions, sees that all necessary contacts are made, sees to the needs of the team, and assures that the limited time of the team is used effectively. At the conclusion of the visit, the chair conducts a final open meeting with members of the college staff. At this meeting the chairperson reports the major findings and recommendations of the team.

### **Before the Visit**

The team chair makes a visit to the campus well before the scheduled team visit. Several months may have passed since the self study was completed, and major changes may have occurred which will materially affect the course and conduct of the site visit. Visiting the college gives the team chair the opportunity to establish personal relationships with key individuals, get a sense of the physical layout of the team room, and begin logistical arrangements for the team, including assessment of computer hardware and software needs. The pre-visit also provides the college with a clearer sense of what the team will need and the opportunity to correct any deficiencies the team chair may note.

### **Correspondence with the Team**

The team chair corresponds with the team members to welcome them to the team, to make assignments, to provide information about travel and housing, to indicate the team schedule, and to set the tone for the entire visit.

## **Manager of the Site Visit**

The team chair is responsible to the Commission for the successful completion of the evaluation site visit. In this capacity, the team chair guides the team during the visit, insuring that the institutional outcomes are assessed in light of the institutional mission and the Commission's standards and that team members have the support necessary to complete their assignments.

## **Author of the Team Report**

The chair is responsible for writing a clear, concise, well-organized and coherent document that will stand up under the careful scrutiny of a wide variety of readers. The report should honestly reflect the views of the team, setting forth the limitations and difficulties which the institution is experiencing and the plans and potential it has for overcoming them. When a team member report is well written, the chair can often use major portions in the final report. However, team members should understand that the team chair is expected to produce a coherent, unified account of the team findings. In doing so, the team chair has considerable editorial latitude in constructing the final report.

## **Analysis of the Self Study and Self Study Report**

### **Preparation and Documentation**

An evaluator will want to look at how the Self Study Report was developed, written, and edited; what evidence exists of broad involvement by campus constituencies; and the nature and quality of the evidence offered in support of the college's assertions. In addition, the evaluator will want to determine if the Self Study Report serves as an effective vehicle for evaluation of the institution by noting if an external evaluator could use the Self Study Report to assess the integrity, quality, and effectiveness of the institution. Evidence cited in the Self Study Report should provide the means for determining the extent to which the institution meets or exceeds the standards of accreditation.

### **Quality of the Self Study Report**

Regarding responses to previous recommendations and Commission actions, the Self Study Report should provide evidence of satisfactory follow-up. If there have been other reports and visits, these issues should have been incorporated into the Self Study Report. The Self Study Report

should also provide evidence that the institution meets or exceeds the standards of accreditation and demonstrate that the institution is meeting its educational goals and objectives. The college should provide evidence that systematic and effective institutional planning and evaluation are being incorporated into institutional decision-making. The Self Study Report should also identify issues of concern to the institution.

### **The Guide to Evaluating Institutions**

Reference to the *Guide to Evaluating Institutions*, designed to be used by institutions conducting a self study and preparing a Self Study Report as well as by teams conducting a comprehensive evaluation, was made earlier. The *Guide* is meant to provoke some thoughtful consideration about whether the institution meets the Accreditation Standards and is also intended to provide some guidance for a holistic, systemic view of an institution and its quality. This common guide is predicated on the belief that both institutional members and outside evaluators use the standards to assess the institution, and that they should be using the same tools to conduct that assessment.

Evaluators should reference the Guide each time they engage in activities associated with a comprehensive accreditation visit. In the main body of the Guide, evaluators will find “Questions to Use in Institutional Evaluation.” Here the reader will find the 2002 Standards followed by sample questions about their application at an institution. The questions are designed to guide a thoughtful examination of institutional quality. There are many other questions that institutions could develop to stimulate thorough self-reflection. Likewise, there are many other questions team members can and should ask to determine the degree to which the institution is meeting the standards and ensuring institutional quality and improvement. The questions should not be used as a substitute for the standards or as substitutes for thorough introspection and examination. At the end of each standard, there is a list of potential sources of evidence. This non-exhaustive list is not meant to indicate that each of the documents must be present, but that these might be sources of the evidence. There may be many other sources that institutions should provide and teams should look for.

A section entitled “Regarding Evidence” has been included to provide some guidance on the nature of good evidence that self study teams and evaluation teams will use to evaluate an institution. There are several different kinds of evidence required during an accreditation review – evidence of structure, evidence of resources, evidence of process, evidence of student progress, and evidence of student learning – and each requires

careful consideration. Evaluators will want to be thoughtful about the kinds of evidence they consider, and the degree to which their conclusions are backed by appropriate evidence.

## During the Site Visit

The evaluation site visit is the culmination of an arduous, time-consuming, and expensive activity on the part of the institution being visited. If done well, the self evaluation process will be of great value to the institution. Evaluators need to be sensitive to the impact of their presence on the multiple internal and external publics and stakeholders who interact with the college.

For evaluators, the team experience provides an opportunity to make a professional contribution which is not duplicated by any other experience. Working together with a group of colleagues, evaluation team members are able to become part of the life of an institution in a very special way.

Accreditation evaluations are about judging and about helping. Teams have the responsibility of determining whether the institution meets or exceeds the standards of accreditation and of providing guidance to the institution in the form of recommendations for improving the effectiveness of the institution. The team's judgment about the educational quality of the institution assists the Commission in giving assurance to the public that the college is meeting its educational purposes.

As noted above, the team will be looking for evidence that the institution can support its assertions. In addition, the team will seek evidence of quality regarding the policies referenced in the Commission's standards, particularly, the "Policy on Distance Learning, Including Electronically-Mediated Learning" and "Contractual Relationships Non-Regionally Accredited Organizations." These policies are found in the *Accreditation Reference Handbook*.

### **Initial Meeting of the Visiting Team**

The team generally meets the day before the first day of the scheduled visit. At this first planning session, the visiting team reviews assignments, examines supplementary materials, arranges schedules, and discusses the Self Study Report of the institution and may actually spend time at the institution examining evidence. Team members should come to this meeting prepared to summarize the key issues they have identified in their primary areas of responsibility, present drafts of questions for interviews, share lists of those individuals or groups to be interviewed, and present lists of additional evidence for review.

## **Meeting with Institutional Staff**

Early in the visit the team meets with administrators, the self study steering committee, and other members of the college staff most involved in preparation of the Self Study Report. At the meeting, the general plan of the visit is discussed with institutional staff. Team members can clarify questions they have about the institutional self study and schedule meetings with individuals or groups such as the governing board, faculty, administration, classified staff, students, and other persons.

This meeting may be followed by a brief tour of the campus to familiarize team members with the physical plant and the locations for campus appointments.

## **Remainder of the Visit**

Team members arrange conferences, make class visits, hold individual interviews, attend team meetings scheduled by the team chair, and review documents provided in the team room. Class schedules should be available and staff contacts arranged. Schedules of faculty office hours and telephone directories are helpful. One or more open sessions where any member of the college community may meet with team members on any aspect of the self study should be held. These sessions should be informal conversations, not large forums for formal presentations by special groups or special interests.

The team chair receives a summary of any formal complaints about the institution which have been received by the Commission. One or more team members may be asked to verify that any issues related to those complaints have been addressed. Occasionally, someone at the institution challenges the accreditation process, self study, or visit. Information concerning these matters should be brought to the attention of the team chair and the team as a whole.

## **Team Meetings During the Visit**

Meetings of the evaluation team are held several times during the visit to summarize the work accomplished, to share concerns, and to plan for the remainder of the visit. In the late morning of the final day, the team meets to review findings and make final plans for the preparation of its evaluation report, including what recommendations are to be included.

## **Team's Confidential Recommendation to the Commission**

The team will make a decision as to the team's confidential recommendation to the Commission. It will also make other major suggestions and comments

which are to be discussed with the college and included in the evaluation report. Drafts of the individual team members' written statements on their assignments are due at this time. Team members also sign the confidential recommendation form at this meeting. (See Appendix A.) The team will make a recommendation to:

- a. Reaffirm Accreditation  
*(requires no further institutional action until the Midterm Report)*
- b. Reaffirm Accreditation with a Progress Report by a Certain Time  
*(based on the team's assessment that some of its recommendations need more immediate attention)*
- c. Reaffirm Accreditation with a Progress Report and Visit  
*(based on the team's assessment that some of its recommendations need more immediate attention and that the institution's progress should be documented by a small team)*
- d. Reaffirm Accreditation with a Focused Midterm Report  
*(based on the team's assessment that some of its recommendations need more emphasis than others)*
- e. Reaffirm Accreditation with a Focused Midterm Report and Visit  
*(based on the team's assessment that some of its recommendations need more emphasis than others and that the institution's progress should be documented by a small team)*
- f. Defer Action on Accreditation  
*(based on the team's assessment that receipt of additional information from the institution is pending or that the institution should be permitted to address serious weakness within six months)*
- g. Issue a Warning  
*(based on the team's assessment that the institution has deviated from the Commission's Eligibility Requirements, Standards or Policies to an extent that is serious)*
- h. Impose Probation  
*(based on the team's assessment that the institution has deviated from the Commission's Eligibility Requirements, Standards or Policies to a major extent)*

- i. Impose Show Cause Order  
*(based on the team's assessment that the institution has deviated from the Commission's Eligibility Requirements, Standards or Policies to such an extent that it should be asked to demonstrate to the Commission why its accreditation should continue)*
- j. Terminate Accreditation  
*(based on the team's assessment that the institution has deviated from the Commission's Eligibility Requirements, Standards or Policies to such an extent that it no longer can be accredited)* Once the team has met, the team chair meets with the chief administrative officer of the institution to review major team findings and to insure that the team has made no major errors of fact. The team's confidential recommendation to the Commission is not discussed, but the team chair reviews key team recommendations with the chief administrator of the college.

### **Exit Meeting**

The team holds a final open meeting with members of the college community. At this meeting, the chair articulates the major findings and offers the college suggestions from the team. The team chair speaks for the team at this meeting. While team members are expected to be present for this final oral report from the team chair, the chair is the spokesperson for the team.

Team members should expect to depart immediately at the end of this meeting. Expressing thanks for assistance, enjoyment at meeting people, or observing institutional activities is appropriate, but team members should avoid engaging in extended conversations about the visit. Team members should not respond to questions from the college community or the press.

#### *Note*

Under no circumstances should the visiting team's confidential recommendation concerning candidacy or accreditation of the institution be revealed. This recommendation must be acted upon by the Commission before the official outcome of the visit is determined.

## After the Site Visit

### **College and Team Review of the Team Report Draft**

Following the visit and prior to the submission of the final report to the Commission, the team chair submits a draft of the report to team members for comment and to the chief administrator of the institution for correction of any factual errors. It is very important that team members communicate with the chair about the draft in a timely manner.

Communication between the institution and the evaluation team should occur through the team chair and/or the Commission office. Contacts by individuals from the institution or in the course of other professional activities should be referred to the team chair or the Commission office.

### **Expenses and Reimbursements to Evaluators**

The President is authorized to reimburse each evaluation team member for necessary travel, food, and lodging expenses.

Evaluators receive expense forms as part of the packet of information from the Commission office. Team members make their own travel and lodging reservations under the direction of the team chair and are reimbursed after the visit. Personal expenses not identified on the expense form are the responsibility of the team member. Receipts for public transportation and for lodging should be attached. Approval for rental cars must be secured in advance from the Commission staff.

### **Evaluation of the Evaluators, the Team Chair, and the Visit**

In order to ensure the evaluation process, the Commission requires that the visit and each of the Commission's representatives be evaluated. Each team member is asked to evaluate the team chair, the team chair evaluates team members, and the chief executive of the institution evaluates the team and the visit (see Appendices B and C for the evaluation forms for team chair and team members).

# The Evaluation Report

## Preparing the Evaluation Report

The evaluation report is not usually a long document. It should be a frank and constructive document that the Commission can use in making a decision about the accredited status of the institution as well as a document that the institution can use for improvement. The report should:

- Evaluate the institution in light of its own stated mission, objectives, and Commission standards.
- Make favorable comments when commendation is due.
- Provide evidence to support the recommendations of the team and provide a fair and useful estimate of the effectiveness of the institution.
- Emphasize student achievement and student learning outcomes.
- Avoid naming individuals, either in praise or blame. Comment, if necessary, on the office, not the officeholder.
- Avoid being prescriptive, leaving the specific remedy to be worked out by the institution.
- Serve the institution well for the next six years.
- Be comprehensive in its scope.

## Some Things to Consider

In preparing the written report, consider the following:

- Internal Consistency*  
Does the report hang together, with no mixed or conflicting messages?
- Clarity*  
Does the report say exactly what is intended, so that there can be no accidental or deliberate misinterpretation?

- ❑ *Perspective*  
Does the language of the report clearly represent observations, conclusions and recommendations as coming from the team as a whole, not just one member or point of view?
- ❑ *Institutional Focus*  
Does the report deal fairly with the entire institution, without advocating selectively for constituency or other special interests?
- ❑ *Documentation*  
Does the text of the report support the recommendations? Do the observations and conclusions clearly state the context or evidence on which the statements are based? Are the specific standards cited to refer the institution to statements of best practice and Commission expectations?
- ❑ *Tone*  
Is the tone of the report appropriate to the circumstances and the intended effect? Unduly harsh criticism or language can affect the climate of an institution and can be harmful to individuals. The report should encourage the institution to take appropriate actions. Accreditation employs the language of diplomacy, while being direct and clear as to meaning.
- ❑ *Restraint*  
Does the report stray into enforcement or advocacy of matters outside the purview of the Commission's standards of good practice? Advocacy of other positions, objectives, or compliance requirements, no matter how praiseworthy or fashionable, must be cast within the language of the standards.
- ❑ *Audience*  
Consider who may read the report, and with what purposes in mind. The document will be available to any persistent reporter, government agency, or legislator. Review the report through public eyes.

### **Sample Format for Team Member Evaluation Report**

A sample template for the evaluation report is included in Appendix D. In addition, the team chair has copies of several reports from teams visiting other colleges which can be used as models. Team members also have

the report from the previous team to the institution being evaluated. If the report from the previous team was not well constructed, it may be a source of examples of things NOT to do as an evaluator. Team members should be alert to changes in format or expectations which may have been developed since the time of the example evaluation reports.

## **Format of the Team Chair's Evaluation Report**

The complete evaluation team report is written by the team chair. A template for the report is included below so that team members can understand what the entire report includes and how their report to the team chair contributes to the whole. Following is a format for the team report.

### **1. Title Page**

This page states the name of the institution visited, dates of the visit, name of the team chair/author of the report. It includes the statement: "This report represents the findings of the evaluation team that visited (name of college) on (dates)."

### **2. Introduction**

This section is a brief statement of the nature of the institution and its accreditation history. General observations about the institution and about the visit are stated in the introduction. If there are commendations to be made, they could be appropriately included in the introduction.

### **3. Responses to Recommendations of the Previous Evaluation Team**

This section of the report evaluates efforts by the institution to address previous recommendations. The institution is free to disagree with team recommendations and to select its own solutions to concerns raised by a previous evaluation team. Thoughtful responses to team recommendations are expected from an institution, whether in agreement or not.

### **4. Evaluations Using ACCJC Standards/Eligibility Requirements**

This section provides most of the substance of the report and is the section to which each team member makes a contribution. The team member's written report is used by the team chair in writing the evaluation team report for the college and the Commission. The team report notes whether evidence has been offered to demonstrate that the institution is accomplishing its published objectives and that these

objectives are appropriate to higher education and consonant with Commission standards. The report establishes whether each standard and eligibility requirement has been met by the institution. The team also provides detailed guidance during the course of the visit.

## 5. The Team Recommendation to the Commission

At the end of the visit the team makes a confidential recommendation to the Commission concerning the accreditation status of the institution. At no time should the content of this recommendation be revealed to the institution. The range of actions available to the team is determined by Commission policy. The complete Commission policy language for each action is found in the Policy on Commission Actions on Institutions in the *Accreditation Reference Handbook*. A copy of the Confidential Recommendation Form is included in Appendix A. The team should discuss these options at the last team meeting.

## Writing Effective Recommendations

One of the most difficult parts of the evaluation team visit is the actual drafting of recommendations to the college. The Commission asks that recommendations be diagnostic rather than prescriptive; supportive rather than destructive; substantive rather than trivial. Recommendations should be confined to those matters which involve the accreditation standards. Translating that expectation into reality under pressure and time constraints is a formidable challenge. The Commission believes that a small number of recommendations which are tightly linked to the standards and call for a thoughtful response by the institution is preferable to an extensive laundry list of many recommendations which does not differentiate between major institutional issues and more minor specific suggestions. The latter can be incorporated into the Conclusions sections of the report. The content of the observations and conclusions sections of the team report should logically and clearly set the stage for any recommendation that the team wishes to make. The recommendation should make it clear whether it is designed to bring the institution to a level that meets the standard or whether it is designed to strengthen a condition that already meets the standard. All recommendations should be followed by citation of the standard(s) in question, assuring that the institution will understand what is being recommend-

ed and what standard is in question.

## **Principles of Effective Recommendations**

### **1. Recommendations should reference the standards.**

Both the college and the Commission should be able to tell at a glance which standard(s) is being addressed. This can be accomplished by a reference to the standard at the end of the recommendation.

### **2. Recommendations should flow logically and clearly from the observations and conclusions in the team report.**

The college will have difficulty responding to and understanding the rationale for a recommendation that has no prior reference in the report.

### **3. Recommendations should make it clear whether they are designed to bring the institution to a level that meets the standard (“*In order to meet this standard, the team recommends that the college ...*”) or whether they are designed to strengthen a condition that already meets the standard (“*In order to increase effectiveness, the team recommends that the college...*”).**

The content of the observations and conclusions sections of the team report should include a comment on whether or not the institution meets the standard. (“The college does not meet the standard.” or “The college meets the standard.”)

### **4. Recommendations should set expectations that an institution take an action or complete a task, using language such as “complete the program review,” “implement the new budgetary process,” etc.**

Recommendations that merely tell an institution to “design a new budgetary process” often result in an institution’s failure to implement the recommendation, and recommendations that tell an institution to “review” or “consider” something frequently result in no action or improvement at all.

**5. Recommendations which relate to several standards should be combined into overarching recommendations.**

This will help to avoid repeating recommendations over and over for each relevant standard. Standard references should be rechecked when recommendations are combined since sometimes in the consolidation process the links to specific standards are weakened or lost. Overarching recommendations should be presented in their complete form in the standard where they first occur and referenced thereafter.

**6. The report should be consistent in its stance on key issues.**

Complimenting a college and making a recommendation on the same issue elsewhere in the report leads to confusion, and such inconsistencies will only serve to weaken the impact of the report.

**7. Recommendations should not contain references that are not part of the standards:**

Terms like “Americans with Disabilities Act (ADA),” “shared governance,” “matriculation,” and “collegial consultation” have specific meaning in some of the systems which govern some member institutions. While the principles included in these terms may be embodied in the accreditation standards, avoid creating confusion that may result from the use of these specialized terms.

**8. Recommendations should not be based on the standards of governmental agencies, the legislature, or organizations.**

The relevant standards for the team are those of the Commission.

**9. Recommendations should be diplomatic, but not to the point of vagueness.**

The college needs to know what the problem is and not be put in the position of trying to guess what the appropriate response might be. The same comment might be made about recommendations which are clichés, or unsupported generalities.

**10. Recommendations should not be prescriptive.**

Describing how a problem should be solved should be left up to the institution.

**11. Recommendations should not merely tell the college to “continue to” engage in a particular activity.**

Recommendations are intended to provide advice in areas where the college needs direction that will enable it to improve or meet the standards.

## Some Special Issues

### **Distance Learning**

Recognizing that most institutions must make use of the growing range of systems for delivery of instruction, including various electronic means, the Accrediting Commission for Community and Junior Colleges has adopted a policy based on principles of good practice to help assure that distance learning is characterized by the same concerns for quality, integrity, and effectiveness that apply to more traditional modes of instruction.

Distance learning is defined, for the purposes of accreditation review, as a formal interaction designed for learning in which the interaction primarily occurs when the student is separated by location from the instructor, resources used to support learning, or other students. Distance learning may employ correspondence study, audio, video, or computer technologies. Educational interactions delivered through these means may occur on campus as well as off campus. These interactions may be synchronous or asynchronous. Team evaluators are expected to assess the distance learning activities of the college, using both the Commission’s standards and the Policy on Distance Learning Including Electronically-Mediated Learning found in the *Accreditation Reference Handbook*.

### **Diversity**

How an institution deals with diversity is an important indicator of its integrity and effectiveness. Every institution affiliated with the Commission is expected to provide and sustain an environment in which all persons in the college community can interact on a basis of accepting differences, respecting each individual, and valuing diversity. Each institution is responsible for assessing the quality and diversity of its campus environment and for demonstrating how diversity is served by the goals and mission of the college and district. In addition, institutions must identify the processes that actively promote diversity in the everyday environment and the academic programs of the college. An accreditation team must evaluate the condition

of institutional diversity during the site visit and include findings and recommendations in its written report to the Commission. Designed to guide evaluation teams in the site visit, the Commission’s “Statement on Diversity” can be found in *Accreditation Reference Handbook*.

## **Institutional Effectiveness**

Concerns about institutional effectiveness thread throughout the standards. They can be seen as themes that can provide guidance and structure to the evaluation of institutional effectiveness. The themes have to do with an institutional commitment in action to providing high quality education congruent with its mission, goals, and plans; evaluation, planning, and improvement; the development and assessment of student learning outcomes; adequate staff, resources and organizational structure; a demonstrated concern with honesty, truthfulness, the manner in which the institution represents itself and deals with all stakeholders, internal and external; and the use of dialogue to facilitate college engagement in inclusive, informed, and intentional guiding of institutional change. A detailed discussion of these themes can be found in the *Guide to Evaluating Institutions*.

## Frequently Asked Questions

### **How can the Self Study Report be used as a primary source document?**

The institution has the responsibility to show that it meets or exceeds the standards of accreditation; therefore, accreditors expect the team to use the institutional Self Study Report as a primary source document for the evaluation visit. A team should confirm that the assertions and evidence presented in the self study are in fact observable at the institution. The team is not on campus to conduct its own self study, nor is it there to impose compliance with any standards other than those of the Commission.

Team members should begin by understanding the meaning of the standards of accreditation. The self study represents the institution’s understanding of its performance against those standards. The team should use the Self Study Report to acquire, through interviews, meetings, direct observation, and examination of written evidence, enough information to support a professional judgment that the institution meets or exceeds the standards.

### **How do I cross-validate? What happens if I get conflicting versions of an event?**

In any college, there may be differences about what the facts are, about how the facts should be interpreted, and about what values the facts represent. In a good Self Study Report, these differences will be forthrightly addressed without pressure to reach a false consensus just to make the college look good. Just as validation involves a special type of assessment, cross-validating asks you to confirm that the information you receive, from whatever source, is generally correct, and not just the opinion or point of view of one individual or group.

Some may attest that the information was not allowed to be in the Self Study Report, some may suggest alternative interpretations are more appropriate, some may not appear to be credible witnesses on the surface, and others may try to use their cloak of office to give more credence to their statements. You should verify through subsequent meetings and discussions whether or not information is generally reliable.

### **How do I organize all this information which comes from so many sources?**

The best way to organize the information is to be fully prepared. That means careful reading of the entire Self Study Report, understanding of the standards and policies in *The Accreditation Reference Handbook*, careful review of the *Guide to Evaluating Institutions*, development of a strategy for meeting with individuals and groups, and thinking about the report before the visit ever starts.

Once the visit starts, you will be literally bombarded by hundreds of bits and pieces of information. One way to organize the material is to prepare a report template of the standards for which you have responsibility, using the report format guide in this Manual. As you read the Self Study Report, make brief notes and indicate any questions you have. Fill in your template with information gathered from the interviews and meetings as your observations and analyses. As you work through the visit, you will be able to see quickly what areas remain to be covered, what areas need further work, and what areas are complete. When you complete an area, begin drafting your report to the chair for that section. You can always go back and change it as new information becomes available to you.

## **What do I do if I find an issue that isn't discussed in the Self Study Report?**

Remember that the Self Study Report, may have been printed as much as four months before the visit. By definition, it is always a record of the status of the institution at that time. On the other hand, institutions do not stand still, waiting for the evaluation team to arrive. Your team chair makes a pre-visit to the college shortly before the team visit and will brief you on any important events to that date. Even with this information, more recent developments may be pertinent to the team's work. There have even been cases where the course of events has rendered much of the information in the Self Study Report irrelevant or at least very much out of date. The institution also has a responsibility to provide important new information, especially if that information contradicts that found in the Self Study Report. Often this takes the form of an update to the self study document.

The first level of assessment should be to ask yourself whether the topic is an accreditation issue. In this situation, refer to the standards for information. You should certainly discuss the matter with the team chair. If the issue does not seem to be covered by one of the standards, discuss the matter with the team as a whole at the next team meeting. The team decides how to deal with it. If the situation is such that the institution should have provided more current information to the evaluation team, then the team has the opportunity to comment on that in the report.

## **How should I handle information that does not relate to my specific assignment?**

Take note of the information and its source, get copies of any printed information, and take the information back to the team chair and team as a whole so the person with that responsibility can use it. You don't have time to go off on a tangent, but you do have a responsibility to gather useful information for your colleagues. At the same time, if you have not been able to validate some of your own areas, don't forget to ask your fellow team members if they have come across information that you need.

## **How should I respond to those who ask me to decide who is right and who is wrong on an issue?**

There have been instances when individuals or groups on a campus believed that the purpose of the visit was to settle all the disputes or disagreements present at the time of the visit. As tempting as it may be, expressing an

opinion favoring one side or the other jeopardizes the independence and credibility of the team's work.

Politely, but firmly, remind the person or group that the standards of accreditation are the basis of the team's assessment and that it would be inappropriate for the team to interject itself into an individual or group dispute. This issue is especially delicate in individual personnel issues, or issues where there may be legal action.

### **How do I write my report so it sounds like a team effort?**

The overall style and tone of the report is very important. Team members are collegial, peer reviewers, not external inspectors. At the same time, the team has the responsibility to point out to the institution areas where the institution should address improvements and issues which indicate that the institution does not meet the Standards of Accreditation.

The Evaluation Team Report is an important document in that it is the vehicle by which critical judgments about institutional performance and quality are expressed by the Commission, and through which formal advice about improvement is given. The report must be a credible and excellent document to have the desired effect. Consider that:

- The Team Report is analyzed in detail by the staff and members of the Commission in reaching decisions about the status of the institution.
- The Team Report is read by faculty, administrators, the public, and trustees of the institution.
- The Team Report has a life of six years, in that the institution must respond to recommendations in its Midterm Report and the following comprehensive review.
- The Team Report is permanently filed at the college and the Commission's office. It may be examined by researchers, job applicants at the institution may request copies, and government agencies or the courts may subpoena them.

# Outline of the Comprehensive Evaluation

This section outlines the important characteristics and processes of a typical comprehensive evaluation. While each visit has its own unique characteristics and context, there is a fairly predictable pattern of events.

## I. Before the Visit

### A. Information from the Commission Office

1. Invitation to serve on a team
2. Notice of training workshop
3. Team Training Workshop
  - a. *Team Evaluator Manual*
  - b. *Guide to Evaluating Institutions*
  - c. *Accreditation Reference Handbook*
  - d. *Distance Learning Manual*
  - e. Team Training Materials
4. Report of previous evaluation team
5. Commission action letters
6. Progress reports if applicable
7. Team roster

### B. Information from the institution— at least eight weeks before the visit

1. Institutional Self Study Report
2. Current catalog
3. Current class schedule

### C. Information from the Team Chair

1. Introductory information and welcome
2. Team survey for making assignments
3. Team member analysis of Self Study Report information
4. Team schedules, logistical arrangements,  
and other matters of interest

#### D. Team Member Activities Before the Visit

1. Attend the mandatory Team Training Workshop
2. Read the Commission manuals, guide, and related materials
3. Read the entire institutional Self Study Report and related materials
4. Respond promptly to team chair requests for information and reports
5. Prepare analyses of Self Study Report as requested by the team chair
6. Prepare lists of individuals/groups for interviews to give to the chair
7. Prepare analytical questions regarding the Self Study Report
8. Make appropriate travel arrangements

## II. During the Visit

#### A. The First Team Meeting

1. Arrive on time
2. Bring appropriate reports or analyses, according to team chair instructions
3. Discuss initial team reactions to the Self Study Report, identify common concerns or themes, determine team approach to institutional issues

#### B. The First Day

1. Attend opening meetings, campus tours as scheduled
2. Become familiar with documents in the team room; examine those documents relevant to the areas of primary and secondary responsibility
3. Schedule and conduct meetings and appointments, including evening and off campus locations
4. Participate in team meetings as scheduled
5. Confer with other team members as needed
6. Determine validity of institutional response to previous recommendations
7. Visit classes/centers/DE courses as appropriate
8. Begin team discussion of core institutional themes
9. Organize findings of first day activity and identify issues/questions for second day focus
10. Continue writing first draft of report to team chair

### C. The Second Day

1. Continuation of first day activities with special focus
  - a. Complete validation of areas not addressed the previous day
  - b. Pursue any issues delegated by the team chair
  - c. Conduct cross-validation of evidence for which conflicting information is provided
  - d. Conduct careful evaluation of institutional evidence to support assertions made in the Self Study Report
  - e. Coordinate findings with other team members
2. Team meetings and discussion of core themes
  - a. Identify key team recommendations
  - b. Confirm that all standards are being addressed
  - c. Develop framework for team report
3. Team member written report
  - a. Complete draft of team member report
  - b. Develop formal recommendations

### D. The Third Day

1. Complete gathering final information or evaluation of evidence
2. The final team meeting
  - a. Review team member findings, reports, and recommendations
  - b. Agree on team recommendations
  - c. Turn in team member report to team chair
  - d. Agree on confidential team recommendation to the Commission concerning accreditation status
  - e. Sign Confidential Recommendation Form
3. Attend final open meeting and leave campus promptly

### **III. After the Visit**

- A. Send Expense Form to Commission office.
- B. Review team chair's draft of the final report.
- C. Complete the evaluation of the team chair and site visit report

# Appendices

## Appendix A—Confidential Recommendation Form

Comprehensive Visit: In Application for Reaffirmation of Accreditation

Name of Institution evaluated \_\_\_\_\_

Dates of visit \_\_\_\_\_

The visiting team's confidential recommendation to the Accrediting Commission for Community and Junior Colleges is:

Actions on Accredited Institutions

- \_\_\_\_\_ Reaffirm Accreditation
- \_\_\_\_\_ Reaffirm accreditation with a Progress Report in \_\_\_\_\_ year(s) [State reasons]
- \_\_\_\_\_ Reaffirm Accreditation with a Progress Report and visit in \_\_\_\_\_ year(s) [State reasons]
- \_\_\_\_\_ Reaffirm Accreditation with a Focused Midterm Report [State reasons]
- \_\_\_\_\_ Reaffirm Accreditation with a Focused Midterm Report and visit [State reasons]
- \_\_\_\_\_ Defer action on accreditation [State reasons]
- \_\_\_\_\_ Issue a Warning to correct deficiencies by \_\_\_\_\_ [State reasons]  
(Date)
- \_\_\_\_\_ Impose Probation through \_\_\_\_\_ [State reasons]  
(Date)
- \_\_\_\_\_ Impose Show Cause Order through \_\_\_\_\_ [State reasons]  
(Date)
- \_\_\_\_\_ Terminate Accreditation [State reasons]

Signed \_\_\_\_\_  
Team Chair

A confidential letter from the team chair is attached to this form if the team recommendation is anything other than Reaffirmation of Accreditation.

## Appendix B—Team Chair Appraisal of Evaluation Team Members

Your appraisal of this evaluation team member will be very helpful to the ACCJC.

**Evaluation Visit To:** \_\_\_\_\_

**Confidential Appraisal Of:** \_\_\_\_\_

**SCALE: 5 = Excellent 1 = Very Poor**

*Circle One:*

1. Was this team member timely in all regards?  
1 2 3 4 5
2. Was the team member prepared for the visit?  
1 2 3 4 5
3. Did the team member display an objective attitude toward the college, particularly in the areas of his or her assigned responsibilities?  
1 2 3 4 5
4. Did this team member appear to understand the importance of confidentiality?  
1 2 3 4 5
5. Was the team member diligent in carrying out assignments?  
1 2 3 4 5
6. What was the quality of portions of the report prepared by this team member?  
1 2 3 4 5
7. Was this team member an asset to the evaluation/accreditation process?  
1 2 3 4 5
8. Do you recommend this team member for future evaluation team membership?  
1 2 3 4 5

Please indicate the standard(s) the team member was assigned to, and his/her level of expertise in covering the assigned standard(s):

Standard(s): 1 2 3 4                      Expertise Level: 1 2 3 4 5

*Please identify general strengths and weaknesses of the team member:*

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

## Appendix C— Team Member Appraisal of Evaluation Visit and Team Chair

Your confidential appraisal of the evaluation visit, including emphasis on the team chair, will be very helpful to the Accrediting Commission for Community and Junior Colleges.

**Evaluation Visit To:**

---

**Confidential Appraisal Of:**

---

**SCALE:            5 = Excellent            1 = Very Poor**

*Circle One:*

Please rate the team chair on the extent to which he/she:

1.        Provided the necessary materials and information about the visit in a timely manner.  
  
          1    2    3    4    5
  
2.        Organized the visit well and made team assignments that were reasonable and appropriate.  
  
          1    2    3    4    5
  
3.        Provided capable guidance to the team before, during, and after the visit.  
  
          1    2    3    4    5
  
4.        Made clear and direct suggestions and worked well with individual members of the team.  
  
          1    2    3    4    5
  
5.        Maintained an unbiased and objective attitude toward the college.  
  
          1    2    3    4    5
  
6.        Should be invited again to serve as a team chair.  
  
          1    2    3    4    5

Suggestions for Improvement of the Evaluation Process

Date:

---

Signature:

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## Appendix D – Team Member Written Report Template

Standard \_\_\_\_\_ Team Member \_\_\_\_\_

### I. Responses to the Previous Team’s Recommendations

The standard team should assess the quality of the institution’s **responses to previous team’s recommendations** including the following:

- Recency of the response
- Completeness
- Validated reasons for non-response or a decision to address the issue differently
- Failure to address the recommendation(s)

### II. General Observations

The standard team may make **general observations** on the general quality of the standard, some recent changes in the institution that warrant notice, attitude of the staff, etc. that were observed through interviews, documentation, meetings visits, etc.

### III. Findings and Evidence

Each standard team should include discussion of the **findings** (observations and analyses) about the degree to which the institution meets or does not meet each standard. This narrative should cite the standards discussed at the end of each paragraph and insure that *each* standard is discussed. Institutional strengths and weaknesses, areas where the institution does not meet or exceed accreditation standards, ways in which the institution can use the Self Study Report and process for institutional improvement, and evaluation of the Self Study Report itself might also be included in this section. The Commission asks that the team comment on two special areas:

- the institution’s progress in developing student learning outcomes, measuring them, and using the results of measurement to plan and implement institutional improvements; and
- the degree of institutional dialogue about student learning and student achievement as well as about institutional processes for evaluation and plans for improvement; evidence of a culture and practice that supports continuous improvement.

Each standard team should also include a discussion of the standard team members’ **evidence** used to conduct the analysis and reach conclusions.

#### **IV. Conclusions**

Each standard team's statement should include a brief **conclusion** section that states whether the institution performs at, below, or above each standard. This section might also include general observations and should include any commendations the team wants to make on this standard.

#### **V. Recommendations**

The standard team should include a section of **recommendations**, if any, for the standard. At the final team meeting, these draft recommendations may be accepted, modified, combined with other recommendations, or deleted. It is important that all recommendations be those which the entire team accepts, not just the perspective or interests of one person.