



Conducting an AEE Site Visit Review

The primary duties of the AEE Reviewers are listed below.

Prepare for the Review. Read all accreditation application materials prior to the review. This information includes the self-assessment study and all supporting documents including: program marketing material, field staff manual, employee handbook, risk management reports and plans, etc., etc.

Communicate. Contact the other members of the review team via conference call to get acquainted prior to the review and to make any arrangements necessary to prepare for the review. The AEE office will provide a toll free conference call number.

Arrange Transportation. Make necessary arrangements for transportation to and from the site of the review. Make arrangements well in advance to keep costs reasonable. The AEE can assist you in this process and cover flight, lodging and car rental. See *Expense Reimbursement* below

Scheduling. The lead reviewer should make sure there is an appropriate review schedule in place and that this schedule has been coordinated with the organization. Detailed schedules can be finalized on site.

Other Logistics. Make necessary arrangements for other logistics while on site. For example, food, transportation, lodging and work space during the review. Also be prepared to observe activities in the field, this means packing appropriate clothing and equipment, if necessary.

Attire, Appearance, and Professional Demeanor. We have had some complaints about “unclean and unkempt” reviewers. You should pack and wear professional attire during the review. Consider where you will be working: a school, a hospital, a university. Also consider with whom you will be speaking: a superintendent, a therapist, or a university president and then dress accordingly (not everyone is enamored of fleece, bare feet and Birkenstocks).

Reference Materials. If you think you will need reference materials during your review, bring them. For example, a copy of the *ACCT Challenge Course Standards* may be helpful to you. If you do not have what you think you need to be prepared, let me know and I will get it for you.

Initial Review Team Meeting. Begin the review with a meeting to discuss how it will all go. Get acquainted, learn about one another’s backgrounds and areas of expertise, plan your strategy for completing the review and allocate responsibilities and tasks.

The Initial Meeting with Program Staff. This is where the external review starts as far as the client is concerned. Here is the outline for the standard briefing. Use an order that works best:

- 1) Introduce the review team, your names, titles and credentials. We want to give the impression that you are all eminently well-qualified to be doing what you are doing. It is ok to take pride in your position and accomplishments.
- 2) Ask the staff of the organization to introduce themselves, their names, credentials and jobs. You might want to take notes on names if you have trouble remembering them like I do. (You will want to keep a list of everyone you speak with, this means first and last name and their title – it helps when writing the report.)
- 3) The lead reviewer should make a brief statement to set the tone of the review. As you can imagine almost everyone is nervous, so take the opportunity to break the ice, ease some apprehensions – humor works. Let our clients know that we are there to evaluate their organization in a supportive way. I often use the phrase that “we are educators helping educators improve what we all do.” We definitely do not want to be seen as the “standards police.”
- 4) Describe where the organization is in the process of accreditation – the external review stage. Describe what is going to happen during the review, that we will be reviewing files and paperwork, that we will be interviewing people (sometimes more than once), and that we will be observing activities. We always strive to be good guests, ask permission to do what we need to do to complete the review.
- 5) Describe what will happen after the review, including timelines. The client should expect the report from AEE within thirty (30) days. The organization will have up to sixty (60) days to respond to any unmet standards in the so-called “Corrective Action Report. The Council meets twice a year, in the spring and the fall, to consider open applications for accreditation. The client will be notified of their accredited status within thirty (30) days of the Council meeting.
- 6) Answer any questions that the client organization’s staff might have.
- 7) It is important to make your role as reviewers clear. You are not to function as consultants (talking shop after hours is o.k.) It is also important to make it clear that you are collecting information on behalf of the Accreditation Council and do not make a recommendation concerning the accreditation of the organization or program. All of this said, we definitely want our clients to feel like they are getting a lot of value from this process; look for appropriate ways to make this happen.

Conduct the Review. Collect all the data you need to make a reasonable assessment of the organization’s level of compliance with the standards. Duties while on site include:

interviewing administrators, staff, and participants, inspection of equipment, inspection of activity sites or facilities, reviewing files and other documents, and observing programming. Through a combination of the above methods, the review team makes an assessment as to whether the program meets or does not meet applicable standards (non-applicable standards include those standards for activities for which the program does not offer programming).

Complete a Draft of the Report. Draft the site visit report including a summary of your findings and the report card before leaving site. Please proof read the report carefully and spell check it! Don't be offended if it is further revised – everyone can use an editor. This report is sent to the AEE Staff within two weeks of the site visit.

Conduct the Exit Interview. At the conclusion of the review, prior to departure, the team discusses a verbal summary of its findings with the appropriate personnel. The purpose of exit interview is to describe, in general, how the review was conducted; preliminary findings; identify themes, trends areas of strength or concern; clarify remaining questions or clarify facts; inform the organization of any unmet standards; and describe the next steps in the accreditation process. You should schedule your departure shortly after the exit interview.

Final Review Team Meeting. Close the review with a meeting to discuss how it all went. Provide evaluation and feedback for one another, acknowledge accomplishments and agree on work that needs to be completed. Provide feedback to the AEE staff regarding Accreditation Program improvements. Complete the following evaluation forms:

- Reviewer Eval of Site Visit
- Reviewer to Reviewer Feedback Form

Submit the Draft Report. The draft report, with signatures, is due to the AEE Staff and Accreditation Council Liaison within two weeks of the review. Sign the signature page before leaving the site and give it to the lead reviewer to mail to me!

Submit Expense Reimbursement. All expense reimbursement requests should be submitted to the AEE office within one week of a review's completion. Expenses should be recorded on an AEE Reimbursement Request form along with receipts. To further expedite the process, consider scanning all receipts and emailing them along the request form to accreditation@ae.org. **Please do not submit expenses to the reviewed program.** AEE invoices programs for all site visit related expenses at one time. This is to protect YOU and to ensure that our volunteers are not burdened by any AEE related costs.