

# **General Orientation Guide**

to

## **PROGRAMMATIC ACCREDITATION PROCEDURES OF THE GENERIC REVIEW COMMITTEE OF THE INTERNATIONAL MONTESSORI ACCREDITATION COUNCIL**

for use by

**SITE VISIT TEAM MEMBERS  
PROGRAM REVIEW COMMITTEES  
PROGRAM DIRECTORS/FACULTY  
INSTITUTIONAL ADMINISTRATORS  
ACCREDITING AND RECOGNITION AGENCIES**

Prepared by the

**GENERIC REVIEW COMMITTEE OF THE  
INTERNATIONAL MONTESSORI ACCREDITATION COUNCIL**

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This GENERAL ORIENTATION GUIDE to the PROGRAMMATIC ACCREDITATION PROCEDURES OF THE GENERIC REVIEW COMMITTEE OF THE INTERNATIONAL MONTESSORI ACCREDITATION COUNCIL has the special purpose of providing prospective and active site visitors with guidance in conducting site visits. The Council's "Accreditation Handbook" provides additional general information concerning the accreditation process. The Generic Review Committee will provide site visitors with program-specific information and guidance.

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# INTRODUCTION

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The GENERIC REVIEW COMMITTEE is established by the Board of Directors of the International Montessori Accreditation Council (IMAC) to evaluate Montessori teacher education programs seeking Council accreditation status outside of the review committee procedures conducted in affiliation with associated collaborating organizations. Members of the Generic Review Committee are appointed by the Council's Board of Directors for renewable terms in accordance with the Council's Articles of Association. Preferably, the Committee includes a balanced, equal representation from each collaborating organization.

Other members of the committee may be appointed by the Board of Directors from among the unaffiliated accredited programs which have been accredited with the Council through the Generic Review Committee; provided however, that there is no conflict of interest with respect to the review of any specific program which comes before the committee for its accreditation review and evaluation. If necessary, non-IMAC members may be allowed to serve on the committee if they are otherwise suitably skilled and qualified in Montessori teacher education. Continuity of participation, expertise and adequate resources are important factors to consider in determining appointments to the committee and the location of committee staff activities and meetings.

Unaffiliated accredited programs provide prior consultation to the Board of Directors in the appointment of appropriate persons to serve on the Generic Review Committee. No person shall be appointed to this committee over the express objection of any unaffiliated accredited program; provided however, that any such objection shall be offered in writing to all Board members within thirty (30) days of the pertinent appointment. Such objection shall include a statement of reason(s) for the objection and shall offer the name of an alternative person who is willing and qualified to serve. (refer to Articles, V. Section 3)

Procedures and policies of the Generic Review Committee are intended to closely conform with that of other review committees. The Generic Review Committee evaluates the relative compliance of programs with its **Essentials and Criteria** and related **Guidelines** which are specifically set forth in Appendix A. Regular meetings of the committee are scheduled to expedite prompt review and decision-making with respect to pertinent issues under consideration.

## INQUIRIES AND GENERAL INFORMATION

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Upon initial inquiry from a program or interested person, the Council provides its "Accreditation Handbook" which sets forth the basic steps in the accreditation process — from initial inquiry to final Council accreditation action. The Council works in collaboration with various other review committees in the operation of its accreditation activity. Contact the Council directly for information about other review committees which employ their own distinct standards, procedures and policies for Council accreditation.

The Generic Review Committee provides information about its own applicable procedures and policies, including **Essentials and Criteria** and related **Guidelines**, to any interested person upon specific written request. Direct all correspondence and communication with the committee to:

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# **SUMMARY OF COUNCIL ACCREDITATION**

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1. **Application for accreditation:** The chief executive officer of the sponsoring institution submits an application for accreditation (Appendix D) to the Council. If the Generic Review Committee (GRC) is specified in the application, the matter is referred to this committee.
2. **Self Study:** The committee provides the program with guidance to complete a Self-Study Report to evaluate the program's relative compliance with Essentials and Criteria. The program submits this report to the committee which provides its initial examination and determines suitability to schedule an On-Site Evaluation Team Visit.
3. **Site Visit:** A volunteer team of individuals knowledgeable about education and Montessori teaching is designated by the committee to review and evaluate the program on site. This On-site Evaluation Team prepares and submits a Site Visit Report to the committee.
4. **Committee Evaluation:** After consideration of the application, the Self-Study Report, the Site Visit Report, and any additional documentation, the committee formulates an accreditation recommendation and forwards it to the Council.
5. **Council Accreditation:** The Council's Advisory Committee examines the GRC recommendation for consistency and clarity in relation to the **Essentials and Criteria**. The recommendation may be referred back to the GRC for further consideration. A formal notice of accreditation status is sent to the chief executive officer of the sponsoring institution and to the program director

## **PROGRAM REVIEW**

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### **Application for Accreditation**

Application for Council accreditation is a voluntary process which is undertaken only with the specific authorization from the chief executive officer of the sponsoring institution of the program. An application form (Appendix D) is submitted to the Council, indicating the specific review committee whose standards and procedures will be applied in the accreditation process. Applications which have indicated the Generic Review Committee for evaluation purposes are referred by the Council staff to this committee. The program is directly informed by the Council staff of its referral.

### **Generic Review Committee Response**

The Generic Review Committee promptly provides the program with the committee's *General Orientation Guide*, which specifically includes the committee's **Essentials and Criteria** and related **Guidelines** (Appendix A) which will be applied to the program in the committee's evaluation procedures. The committee also sends to the program specific instructions and format for preparing the Self-Study Report.

### **Self-Study**

Self-study (also called self-analysis or self-assessment) is required of all programs requesting consideration of Council accreditation. The GRC provides specific guidance in this self-study process through instructions and materials given to the program. These materials include an outline format for preparing the Self-Study Report which is 'keyed' to the **Essentials and Criteria**.

## Self-Study Report

The program must prepare and submit a Self-Study Report to the committee which documents in writing the program's own evaluation of its intended or actual outcomes and operation necessary to indicate substantial compliance with the **Essentials and Criteria**. The committee provides specific instructions for presenting the narrative and documentation according to a format which follows the sequence of the **Essentials and Criteria**. The documentation substantiating the narrative is intended as representative rather than comprehensive and does not exceed what is required to demonstrate compliance with the **Essentials and Criteria**. The narrative and documentation culminates in a qualitative analysis of the program's strengths and weaknesses and with a statement of actions planned to correct the latter.

A specified number of copies of the Self-Study Report shall be submitted to the Generic Review Committee for its preliminary examination to determine the report's completeness and potential of the program to ultimately receive favorable Council accreditation. The number of copies required shall not exceed the total number of members of the committee.

The program will be specifically informed in writing of the committee's examination of the Self-Study Report as soon as possible; in any case, within a period of time not to exceed ninety (90) days following the date of its submittal. Unfavorable examinations shall specify any deficiencies of the Self-Study Report with reference to completion, format or compliance with the **Essentials and Criteria**, giving the program a reasonable opportunity to provide suitable correction, modification and resubmittal in due course for further consideration. Based on a favorable examination of the Self-Study Report, the committee schedules an On-Site Evaluation Team Visit in accordance with the convenience and interests of all parties concerned.

## On-Site Evaluation Team Visit

The program is visited by a team which is designated and assembled by the committee and acceptable to the sponsoring institution. Team members serve in a voluntary capacity with expenses charged to the program under evaluation by the committee in accordance with applicable policies and procedures. Those who wish to be considered for team member service are advised to contact the committee or the Council directly. Additional team members (without experience or sufficient knowledge), may be designated as observer-members. The site visit process provides the opportunity to validate and/or clarify the content of the Self-Study Report to determine the extent to which the program under evaluation complies with the **Essentials and Criteria**. The visit, which may vary in length depending upon the size and complexity of the program, is scheduled for a mutually convenient time. The Self-Study Report is supplied to all team members with sufficient time before the date of the visit to enable its complete prior study and review.

1. **Team Composition:** The composition of the team may vary according to the judgments and experience of the committee. Site visit teams usually include two or more professionals with special knowledge of Montessori education. Members of the committee, Council staff, and others with special knowledge and interest in the accreditation process may also be included on the site visit team. At least one member of the team should be a person not on the Generic Review Committee itself. All site visitors must be acceptable to the sponsoring institution; provided however, that any objection to the team composition is given to the committee in writing in a timely manner before the visit, with substantial reason(s) for the objection, and offering an alternative qualified person who is willing and able to serve in this capacity.

The committee charges its representative On-Site Evaluation Team with gathering data on which the committee can evaluate the compliance of the program with the **Essentials and Criteria**. In addition, site visitors offer a Site Visit Report to indicate their own evaluation of the evidence of the extent to which a program is in compliance.

## 2. Team Activities

- Preparing for the site visit by studying the Self-Study Report and related program information in conjunction with the **Essentials and Criteria** and the committee directions;
- Conducting a pre-visit on-site meeting of team members to determine the facilities to be visited, the individuals to be interviewed, the reports and records to be reviewed, and additional information to be collected, as well as to determine the respective function, responsibility and activity of team members during the visit.
- Meeting with and interviewing various individuals and groups, such as the chief executive officer of the sponsoring institution or his/her representative, the program director, administrator(s) of the program, resource personnel, instructors, students and graduates;
- Performing specific functions designated in the pre-visit meeting;
- Analyzing the results of the site visit;
- Presenting findings (accompanied by references to specific **Essentials and Criteria** if marginal or noncompliance is identified) during an exit conference with appropriate institutional administrators, program administrators, and others;
- Providing sponsoring institution and program officials with an opportunity to respond to the findings to correct any misconceptions, inaccuracies, etc.; and
- Completing the Site Visit Report.

Objectivity and impartiality are essential throughout the site visit process. In addition, the Program Site Visit Questionnaire (PSQ) (refer to Appendix C) provided by the Council gives programs an opportunity to comment on (a) the arrangements for the site visit, (b) the performance of the site visit team, (c) the participation of institutional personnel in conducting the self-study and preparing the Self-Study Report, and (d) suggestions for improving the overall program review process.

## **Model Site Visit Agenda**

The model site visit agenda of the Generic Review Committee provides an outline and assigns approximate times to all the functions the site visit team is ordinarily expected to complete. The format specifically accounts for all the time allotted to the visit and identifies all interviewees by title.

The actual agenda for the visit is most suitably arranged between the Generic Review Committee staff (or the team leader) and the program director (or other program official) well before the visit is to take place. Program officials take part in the preparation of the agenda so that it accommodates the characteristics of local facilities and allows for scheduled interviews with appropriate faculty, students, and administrators.

The agenda normally provides for a private team meeting before the exit conference to reach consensus on findings, to prepare the final report, and to designate team roles for the final conference.

Finally, the agenda indicates prompt closure at the end of the exit conference, with the immediate departure of the team.

Following the opening conference with institutional program officers to state the purpose of the visit and team expectations and needs, it is acceptable for the individual team members to undertake separate interviews and visits within the program and the sponsoring institution. They ordinarily plan to come together for periods of working lunches and other conferences and interviews as necessary.

The model agenda includes interviews with students without faculty attending. Alternatively, students may be interviewed separately, in pairs, and so forth, at the option of the Generic Review Committee and the visiting team. It is not deemed productive to observe a routine didactic class in session; a team member's presence alters the classroom environment.

The Generic Review Committee recommends that nearby facilities and other institutions affiliated with the program be visited if time and distance permits, and that affiliated supervisory personnel be interviewed wherever possible. If this is not possible, such affiliated personnel may be requested to appear for interview at a central location. Within that guidance, team members determine these visits and specific interviews. In any event, efforts are made to restrain visit costs while determining the relative compliance of the affiliates with the **Essentials and Criteria**.

The following model visit agenda for one and a half days, with illustrative timing, is offered as an example for general guidance to all parties involved in the actual site visit. Exceptions to this example would occur according to the specific direction of the Generic Review Committee and the nature and scope of the particular program under evaluation.

As noted elsewhere, visiting team members have the authority to alter an established agenda on-site but do so only with every consideration given to its impact upon the schedules and commitments of those persons to be interviewed.

## **MODEL SITE VISIT AGENDA - One and a Half Days**

### **STRATEGY MEETING OF SITE VISIT TEAM**

**PURPOSE:** To allow team members to get acquainted, review the site visit schedule, discuss their perspectives of the program on the basis of the information provided in the Self-Study Report, and identify those areas they believe merit more thorough review. In addition, the team determines if and how specific activities will be pursued by each member.

### **FIRST DAY**

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#### **8:30 am PRELIMINARY CONFERENCE**

A meeting with institution officers, the program director, and other administrative personnel as appropriate.

**PURPOSE:** 1) To allow the evaluators to review briefly the purpose of the site visit, the accreditation process, and the roles and functions of the Generic Review Committee and the Council, and 2) to review the schedule for the first day as planned by the program, making adjustments as necessary.

**9:00 am MEETING WITH PROGRAM DIRECTOR**

**PURPOSE:** To provide the visitors with an opportunity to obtain a more complete understanding of the curriculum and the program objectives, philosophies, course objectives, operational procedures, student selection criteria (if used), student evaluation protocols, enrollment, student attrition rates, processes for monitoring progress in development of student knowledge and skills, success of program graduates, etc.

**11:00 am VISITS TO SUPPORT SERVICES**

**PURPOSE:** To review facilities and education support resources.

**12:00 pm Working Lunch**

**1:00 pm INTERVIEWS**

(Sequence and time allotments below may vary as desired)

**Faculty** - To discuss specific subject areas, e.g., practicum courses, course selection and content, instructional methods and objectives, evaluation mechanics, etc. - 1 hour.

**Students** - To obtain reactions to all phases of the program through a group meeting or private interviews, without faculty or others being present. - 2 hours.

**Program Director, other staff personnel** - To obtain additional information, to clarify points of information acquired during the day to review documents pertinent to the Self-Study Report and program operation, and to review the schedule for the second day of the visit. - 1/2 hour.

**4:30 pm TOUR OF FACILITIES**

**PURPOSE:** To familiarize site visitors with specific physical facilities used by students during didactic and/or supervised practice components of the program. The duration of the tour is intended to be brief.

**Evening**

The program is requested not to schedule activities for the evening. The site visitors use dinner and evening hours to discuss information acquired throughout the day, to identify areas requiring further inquiry the following day, and to draft as much of the Site Visit Report as possible.

**SECOND DAY**

The schedule normally concludes by midday, and no later than 3:00 pm.

**VISITS TO AFFILIATE SITES**

**PURPOSE:** To review educational facilities or affiliate sites. Preferably, this is done by visiting representative (or all) facilities, which have been chosen as affiliates, to survey the quality of their educational environment. The time required for site visits to affiliate sites will vary due to factors such as distance. If several sites are to be visited, the site visitors may be separated.



## **INTERVIEWS**

### **Supervisory and Instructional Personnel at Affiliate Sites**

**PURPOSE:** To provide the site visitors with an opportunity to assess the faculty's involvement in the program, their contacts with the program administration, teaching methods, and the type of supervision, instruction and evaluation afforded students in the setting.

### **Students at Affiliate Sites**

**PURPOSE:** To obtain students' reactions to the program.

### **Employed Program Graduates (as possible and reasonable)**

**PURPOSE:** To provide the site visitors with an opportunity to evaluate graduates' satisfaction with the educational process and the degree to which the program prepares graduates to perform entry-level functions. If face-to-face interviews are impractical due to practice demands and/or geographic distribution of employment sites, the program may arrange for interviews by telephone.

## **PREPARATION OF SITE VISIT REPORT** (Program provides private meeting space)

**PURPOSE:** To enable team members to reach consensus on findings, complete their written report, and prepare for the exit conference.

## **CONCLUDING MEETING WITH PROGRAM DIRECTOR** (15 minutes or less)

**PURPOSE:** To share the general findings and conclusions to be incorporated in the draft of the Site Visit Report with the program director prior to the exit conference.

## **EXIT CONFERENCE**

A concluding meeting with the program director, and other administrative staff as appropriate. (30 minutes or less)

**PURPOSE:** To share with program and institutional administration the general findings (and consensus conclusions to the extent permitted by the Generic Review Committee) of the visitors.

## **CONDUCT OF THE EXIT CONFERENCE**

The leader of the On-Site Evaluation Team first expresses appreciation for the courtesies extended during the site visit and for the schedule arrangements. Next, the team leader informs the group of the following subsequent steps in the accreditation review process:

1. The program receives a written Site Visit Report from the Generic Review Committee staff at an early date, usually within two weeks. If specifically permitted by the Generic Review Committee, copies of the written report, if complete and clear, may be left with the chief executive officer and the program director.

2. The chief executive officer and the program director are invited to comment on the Site Visit Report in writing and to correct any inadvertent errors in factual information. Response is optional.
3. The Generic Review Committee considers all appropriate materials at the next meeting following the site visit and forwards an accreditation recommendation to the Council. Prior to forwarding recommendations of **Probationary Accreditation**, **Accreditation Withheld**, or **Accreditation Withdrawn** to the Council, the Generic Review Committee provides the program with a description of the process for requesting reconsideration.
4. The Advisory Committee of the Council acts on the review committee recommendation
5. The sponsoring institution receives formal notification of the accreditation action by the Council
6. The program has the right to appeal to the Council an award of **Accreditation Withheld** or **Accreditation Withdrawn**. The Council letter informing a program of such adverse action will include a description of the appeals process.

Prior to presenting their findings, site visitors indicate that observations of principal strengths of the program will be stated first, followed by identification of any deficiencies in the program's relative compliance with the **Essentials and Criteria**. Specific deficiencies noted must be related to specific **Essentials and Criteria**. Site visitors may or may not indicate a recommended accreditation category, depending upon prior instructions from the Generic Review Committee.\* The Team Leader invites the other site visitor(s) to participate as planned. If program or instructional staff do not agree with a finding or conclusion, they may offer clarifications or corrections and the report may be modified promptly on agreement of the team members. The Team Leader closes the oral report with expressions of appreciation for all the program's contributions to the review process and terminates the session promptly. At the conclusion of the exit conference, site visitors depart promptly to avoid the possibility of diffusing or confusing the report of findings. Post-exit conference consultation should not be undertaken.

*\* Should the team be instructed or permitted by the Generic Review Committee to formulate and present an accreditation recommendation, the team leader must indicate that the Generic Review Committee makes the final recommendation, which may be different from that presented by the team on site.*

### **SPECIAL CONSIDERATIONS**

- Site visitors are very sensitive to their language, both when soliciting information and when giving opinions, and especially when discussing evaluative issues and observations regarding the program's compliance with the **Essentials and Criteria**. Words with negative connotations may usually be avoided, as will reprimands and lecturing, when ascertaining how faculty, students, and others perceive program content and administrative and teaching policies and processes. Site visitors strive, through both verbal and non-verbal communication, to make the persons with whom they are talking feel comfortable about discussing the relative strengths and areas of concern as well as what they contribute to or receive from the program. If notes are taken during the interviews or discussions, they should be recorded unobtrusively to avoid interfering with developing and maintaining good rapport.

- Before endorsing it by signature, each team member must review the final written Site Visit Report to ascertain that:
  - a. It is legible, clear and accurate, without important omissions.
  - b. Names of persons do not appear in the Site Visit Report proper but do appear as an appended list of those interviewed; titles of persons appear in the report as necessary but only in impersonal and objective reference, or for the purpose of commendation.
  - c. Personal or unverified observations have been removed.
  - d. Needed editorial improvements have been made.
  - e. Any deficiencies cited have been supported in the body of the report and that each references one or more specific section of the **Essentials and Criteria**.

If the team completes its report on-site and leaves a copy with the sponsoring institution for written comment, it is imperative that the assurances noted above be satisfied before the copy is provided.

The Site Visit Report does not contain differing views from individual team members. If such views are not resolved during the visit, they may be conveyed confidentially in writing to the Generic Review Committee following the site visit, with courtesy copies to the other team members. Every effort must be made on-site to achieve team consensus on all aspects to be reported prior to the exit conference. A persisting difference of opinion should not be made known in the exit conference.

## **Site Visit Report Procedures**

The Generic Review Committee provides the format of the Site Visit Report which is completed and signed jointly by all members of the On-Site Evaluation Team following completion of the site visit. This Site Visit Report is submitted to the Generic Review Committee within seven (7) days of completion of the visit. The committee then prepares the formal written copy of the Site Visit Report and sends copies of the report to the chief executive officer of the sponsoring institution and to the program director within thirty (30) days following the visit for comment and correction with regard to factual errors and conclusions.

Normally, the Site Visit Report will reach the sponsoring institution promptly within two weeks of the site visit. Longer period must be justified by Generic Review Committee staff. In no instance does this period exceed thirty (30) days.\* The written materials provided to the sponsoring institution included in the Site Visit Report identify program strengths and areas of concern. Specific **Essentials and Criteria** must be cited in the report if marginal noncompliance or noncompliance is identified.

Response of the program to the Generic Review Committee concerning the Site Visit Report must be in writing and received by the committee within fourteen (14) days of the date of receipt of the report by the pertinent program official(s). Sufficient copies of this response must be provided by the program to the Generic Review Committee for distribution to all committee members and to all members of the On-Site Evaluation Team. The program's written response (and any supporting documentation) is added to the Site Visit Report, and copies are sent by the committee staff to all members of the On-Site Evaluation Team and to all members of the Generic Review Committee, at least fourteen (14) days before the date of the committee meeting scheduled to consider further action on the matter.

## Generic Review Committee Evaluation

After the program has had adequate time to respond to the content of the Site Visit Report, the program is placed on the agenda for the next meeting of the Generic Review Committee. The committee may meet several times each year by telephone conference or otherwise. During these meetings, the committee considers each current application for initial or continuing accreditation, accreditation policies and procedures, and any other pertinent matters such as staffing and financing the work of the committee.

The principal committee activities include a complete review of (1) the program's application for accreditation; (2) its Self-Study Report; (3) the Site Visit Report; (4) the applicant program's response to that report; and (5) any related documentation.

Once the committee members have obtained a consensus regarding an applicant program's merits for accreditation based on relative compliance with the Essentials and Criteria, a recommendation is formulated for transmittal to the Council. (refer to Appendix B, "Accreditation Categories")

A Council representative may attend the committee's meetings to provide comments and interpretations regarding the Council's policies, as well as to assist the committee in assuring that the Council's policies and procedures are observed or brought to the committee's particular attention for review.

*\* The turn-around time for Site Visit Reports may be facilitated as follows if copies of the completed report are not to be left with the sponsoring institution: 1) Team members complete the written report on-site or elsewhere (e.g., airport) before the team disperses; 2) each team member signs the report (with printed name as well if legibility is questionable); 3) committee staff duplicates or types the report, also typing the signatures with /s/ and a notation stating that the original report bearing the actual signatures is on file.*

## Committee Reconsideration of Recommendations to Withhold or Withdraw Accreditation, or to grant Probationary Accreditation

Accreditation recommendations of the Generic Review Committee to "withhold" or "withdraw" accreditation or to grant probationary accreditation are scheduled for review by the Council's Advisory Committee only after the program has been given an opportunity to specifically request a reconsideration of the matter by the committee. To expedite a favorable reconsideration, the Generic Review Committee informs the sponsoring institution of the program in writing of its proposed recommendation to the Council to withhold or withdraw accreditation, or to grant probationary accreditation, including:

1. Specification of the area(s) in which the program is not in substantial compliance with the **Essentials and Criteria** and
2. A description of the process for reconsideration, indicating that the program has a period of thirty (30) days within which time to request such reconsideration by the Generic Review Committee

With its notice to the program concerning reconsideration, the committee may offer specific suggestions for change of the program's operation to enable a more favorable accreditation recommendation. The program's request for reconsideration must respond by conforming to the suggested changes or by providing some other substantial evidence of compliance with the **Essentials and Criteria** relating to the area(s) of the program operation at issue in the matter.

If there is no request by the program for reconsideration of the committee's recommendation within the stipulated time, the Council's Advisory Committee will act on the pending recommendation at its next regular scheduled meeting.

## **COUNCIL ACCREDITATION**

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### **Council Advisory Committee Activity**

Accreditation recommendations from the Generic Review Committee are examined by the Council's Advisory Committee for consistency and clarity in relation to the applicable **Essentials and Criteria**. The Advisory Committee gives special attention to recommendations for placing programs on probation or for withdrawing or withholding accreditation.

It is not the function or purpose of the Advisory Committee to duplicate the work of the Generic Review Committee in making an independent assessment of each program's relative compliance with the **Essentials and Criteria**. Advisory Committee reviews are designed to provide assurance that established Council and committee policies and practices have been followed and that due process has been observed in arriving at accreditation recommendations. The Advisory Committee may also examine suggestions and recommendations for program improvement that may be perceived as inappropriate intrusions into the administrative prerogatives of a program and its sponsoring institution.

If the Advisory Committee finds itself unable to support the Generic Review Committee's recommendation, Council accreditation action is deferred and the recommendation is returned to the Generic Review Committee for further consideration.

Council staff sends a formal notice of accreditation action taken by the Advisory Committee to the chief executive officer of the sponsoring institution and to the program director.

### **Ensuring Due Process**

In order to ensure due process for all parties involved in the accreditation and operation of Montessori teacher education programs, the Council and the Generic Review Committee disseminate clear descriptions of the rights of the parties involved and of their recourse should they feel that those rights have been denied. (refer to Council's "Accreditation Handbook")

### **Confidentiality in the Accreditation Process**

Meticulous efforts are made by all component of the peer review process to maintain the confidentiality of information collected during the entire accreditation review as well as the avoidance of conflict of interest. Materials, such as the Self-Study Report and the Site Visit Report, are to be read and discussed only by members of the On-Site Evaluation Team, the Generic Review Committee, the Council's Advisory Committee, and other authorized persons.

The Council and the Generic Review Committee consider the pertinent supporting documentation, the Self-Study Report, and the Site Visit Report, to be the property of the sponsoring institution.

The Generic Review Committee makes available to the public its **Essentials and Criteria** for accreditation and reports of its operations. The Council maintains and provides to the public the official list of both accredited programs as well as those programs which are no longer accredited.

## **Accreditation Fees**

Fees are charged to the program under evaluation by the Generic Review Committee only to the extent necessary to conduct its own specific accreditation review activities. Regular committee meetings are held without cost to the programs under review, and all committee members and site visitors serve voluntarily without salary. Substantial printing, postage, telephone and special meeting costs directly related to the program's review are calculated and payable by the program prior to the committee's recommendation for accreditation. No Council accreditation shall be granted through the Generic Review Committee without that committee's statement of completion of all applicable costs by the program in the accreditation process.

Costs for the On-Site Evaluation Team visit shall include travel and accommodations (if any) for all team members. Ordinarily, estimated cost of travel is paid by the program to the Council for distribution to the team members well in advance of the scheduled date for the visit. Any remaining balance of costs incurred in the process of conducting the site visit itself shall be payable by the program in due course upon the committee's specific request, or otherwise prior to the time of the committee's recommendation for accreditation.

# Chart I

## TEN COMMANDMENTS FOR THE SITE VISIT TEAM\*

1. **DON'T SNITCH:** Site visitors often learn private matters about an institution that an outsider has no business knowing. Don't "tell tales" or talk about the weaknesses of an institution.
2. **DON'T STEAL APPLES:** Site visitors often discover promising personnel. Don't take advantage of the opportunity afforded by your position on the team to recruit good faculty members.
3. **DON'T BE ON THE TAKE:** Site visitors may be invited to accept small favors, services, or gifts from the institution. Don't accept, or even suggest, that you would like to have a sample of the wares of an institution -- a book it publishes, a product it produces, or a service it performs.
4. **DON'T BE A CANDIDATE:** Site visitors might see an opportunity to suggest themselves for a consultantship, temporary job, or a permanent position with the institution. Don't apply or suggest your availability until after your site visit report has been officially acted on.
5. **DON'T BE A NIT-PICKER:** Site visitors often see small problems that can be solved by attention to minor details. Don't use the accreditation report, which should deal with major or serious policy-level matters, as the means of effecting minor mechanical reforms.
6. **DON'T SHOOT SMALL GAME WITH A BIG GUN:** The accreditation process is developmental, not punitive. Don't use accreditation to deal heavily with small programs that may feel that they are completely at the mercy of the site visitors.
7. **DON'T BE A BLEEDING HEART:** Site visitors with "do-good" impulses may be blinded by good intentions and try to play the role of savior. Don't compound weaknesses by sentimental generosity in the hope that a school's problems will go away if ignored or treated with unwarranted optimism.
8. **DON'T PUSH DOPE:** Site visitors often see an opportunity to recommend their personal theories, philosophies, or techniques as the solution to a program's problems. Don't suggest that an institution adopt measures that may be altered or reversed by the review committee or by subsequent site visit teams.
9. **DON'T SHOOT POISON DARTS:** A committee may be tempted to "tip off" the administration to suspected treachery or to warn one faction on a campus of hidden enemies. Don't poison the minds of the staff or reveal suspicions to the administration; there are more wholesome ways to alert an administration to hidden tensions.
10. **DON'T WORSHIP SACRED COWS:** Don't be so in awe of a large and powerful institution that you are reluctant to criticize an obvious problem in some department.

\*Adapted and summarized from "A Decalogue for the Accreditation Team,"  
Hector Lee (COPA Agenda, February 5, 1976)

## **Chart II**

### **CHARACTERISTICS OF SUCCESSFUL SITE VISITORS**

**BACKGROUND** Site visitors have sufficient general educational and special training relative to Montessori education or accreditation procedures to form a solid foundation for program evaluation. The amount and kind of such education and training depends upon the type and level of program to be evaluated. Evaluators may be either generalists in serving on an evaluation team or content specialists who are themselves practitioners or educators within the field of training represented by the program.

**SITE VISIT TRAINING** Traditionally, site visitor training has taken place on-the-job: selected persons were appointed as observer-members of teams and were taught both by prior instruction and by on-site observation. Site visitors in recent years have received more formal and organized training through workshops of various lengths conducted by experienced evaluators representing numerous occupations and national associations. In addition, there are beneficial printed materials.

**ATTITUDE** Effective site visitors demonstrate maturity, objectivity, diplomacy and dedication. They project an image of professionalism both in behavior and appearance. Site visitors appreciate the confidential nature of the task and understand the need for self initiative, for a cooperative attitude, for an analytic approach to the task, and for necessary degrees of flexibility.

**KNOWLEDGE** Effective site visitors have an appreciation of the current status of Montessori teaching and of the entire accrediting process. They have sufficient general and special background to be able to exercise appropriate judgment. In addition, effective visitors thoroughly understand the educational standards being used and what constitutes deviation from or noncompliance with those standards. It is imperative that site visitors be totally familiar with the content and meaning of the Self-Study Report and related materials provided to them prior to the site visit.

**SKILLS** Site visitors are skilled in interviewing, in interpersonal communications, in self expression, in note taking, and in maintaining objectivity. They are skillful in dealing with attitudinal problems that may be presented by those being interviewed. Through experience and education, site visitors have developed capacities for deductive reasoning and for logical analysis. They are skilled in writing and accurate in recall.

**PHYSICAL FACTORS** The physical condition of the site visitors permit them to do whatever is necessary to conduct the visit in the particular locale and within the specified period.

Adapted from General Orientation Guide of Committee on Allied Health Education and Accreditation (CAHEA)



# Appendix A

## ESSENTIALS AND CRITERIA For the Generic Review Committee

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### Description of a Montessori Teacher

**A Montessori teacher is one whose being with children effectively supports and nurtures the children's normal growth and development. Such normality of growth and development is based on the observations and discoveries of Dr. Maria Montessori as reported in her various pertinent writings and publications since 1907. Montessori teaching broadly reflects an adult function of observing children with freedom in a prepared environment.**

*Criteria* — The program shall be guided in its purpose and all aspects of its operation by outcome results and competencies in Montessori teaching skills which are consistent with the following:

*Qualities of a Normal Child:*

Precociously intelligent  
Eager for Knowledge  
Spontaneous self-discipline  
Profound concentration  
Social Sentiments of help and sympathy for others  
Instinct towards Independence  
Joy in goal-directed activity  
Continuous and happy work  
Attachment to reality  
Prudence

*Qualities of a Montessori Teacher:*

Skilled in Observation  
Patience  
Humility  
Calmness  
Faith in Normality  
Well-acquainted with self-educational didactic material  
Imagination  
Power of Silence

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### I. Sponsorship

- A. The sponsoring institution must be clearly identified and described in writing. In programs provided by two or more institutions, responsibilities of the sponsoring institution of each affiliate for program administration, instruction, supervision, and so forth, must be clearly described in written documents, such as an affiliation agreement or memorandum of understanding.**

*Criteria* — The sponsoring institution provides official written evidence of its legal authority and structure as an educational organization to sponsor and conduct a Montessori teacher education program.

**B. Accredited educational programs may be established by a lawful institution or person whose purpose includes the operation of Montessori teacher education.**

*Criteria* — The sponsoring institution complies with all applicable governmental requirements and provides evidence of a postsecondary level and scope of operation.

**C. Accreditation is granted to the sponsoring institution that assumes primary responsibility for curriculum planning and selection of program content; appoints program faculty; coordinates instruction; receives and processes applications for admission; and grants or authorizes the issuance of the certificate or diploma documenting completion of the program. The sponsoring institution shall be responsible for providing assurance that all activities assigned to students are educationally consistent with the purpose of the program.**

*Criteria* — Relationship and affiliations between the sponsoring institution and other organizations or institutions shall be completely disclosed to the extent of their materiality to Montessori teacher education and the sponsoring institution's educational policies and practices. There must be identified a sponsoring institution which has ownership control of and primary responsibility for all material aspects of the program. The program's goals and objectives shall be reasonable, clearly defined and consistent with the program's purpose. The sponsoring institution shall disclose the names and background of its principal individuals in ownership control and the status of all other pertinent accreditation.

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## II. Resources

### A. General Resources:

**Resources must be adequate to support the number of students admitted to the program to achieve the stated objectives of the curriculum.**

*Criteria* — The program shall be able to demonstrate its class size as conducive to effective student learning. The number of students for which any one instructor is responsible shall never be so large that the individual student is effectively unable to maintain personal contact with the instructor when needed to assure successful progress.

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### B. Personnel

#### 1. Administration

**The program must be operated within an administrative structure which effectively assures that institutional practices and policies are consistent with the program's stated purpose and objectives.**

*Criteria* — The program shall give evidence of being administered by an educationally competent and responsible person or body. The functions of trustees, ownership body or board members, faculty and administrative staff officers shall be clearly defined with evidence that operation is consistent with the program's stated purpose and objectives. Responsibilities shall be assigned for admitting students, maintaining records of students' program and progress, evaluating students and verifying that certification requirements have been met and that the program has been successfully completed. The program shall have a policy and practice of commitment to effective communication between administration and faculty with respect to curriculum operation, instructional skills and program development.

## 2. Program Officials

**The program must have a program director who shall be responsible for the organization, administration, periodic review, continued development, and general effectiveness of the program.**

*Criteria* — The function and responsibility of the Program Director and other essential program officials must be clearly *defined*. Program officials shall be identified and shall have sufficient pertinent experience, skill and knowledge to perform assigned responsibilities. The Program Director shall be the principal individual responsible for the overall successful operation of the program and shall have sufficient educational and business experience to assure the program's effective educational and business operation.

## 3. Instructional Staff

**Faculty members must be knowledgeable and effective in teaching the assigned subject.**

*Criteria* — The function and responsibility of instructional staff must be clearly defined. Faculty members shall be identified and shall possess a mature, professional attitude, and be qualified through academic preparation and experience to conduct the subject matter assigned. There shall be evidence that faculty members have a basic knowledge of the subject matter assigned and a willingness and interest to organize and present the subject matter effectively to the students.

## 4. Professional Development

**Programs shall demonstrate encouragement of continued professional growth to provide assurance that program faculty and officials can fulfill the responsibilities delineated in the Essentials and Criteria.**

*Criteria* — There shall be evidence that program officials and faculty members are encouraged to continue their professional development through further pertinent participation, study and experience in Montessori teacher education; e.g., Montessori educational seminars, conferences and workshops.

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## C. Financial Resources

**Financial resources shall be assured to fulfill obligations to enrolled students.**

*Criteria* — The sponsoring institution shall provide sufficient financial resources for continuing operation of the program and for the effective accomplishment of the announced purposes of the program. The funds available for the program must be so expended as to provide adequately for instruction, facilities, equipment and supplies, and other costs as the case may be.

*Criteria* — Program costs shall be shown in a budget or financial statement prepared in accordance with sound financial and educational practice. The sponsoring institution shall issue an annual financial statement giving a clear and accurate picture of its financial status. The financial records shall be kept in such form that the economic status of the program and its sponsoring institution may be readily determined.

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## D. Physical Resources

### **Adequate facilities, equipment and learning resources shall be provided.**

*Criteria* — The sponsoring institution shall provide sufficient space for administrative offices and other physical premises to accomplish the program's stated purpose and objectives. Materials and equipment shall be provided in sufficient quantity and variety to effectively accommodate the number of students enrolled. An appropriate collection of an adequate number of pertinent books on Montessori education shall be maintained or readily available to the sponsoring institution to enable students to obtain their possession and use in accordance with reasonable terms and conditions.

For programs which hold on-site and/or practice sessions, there shall be included adequate instructional space and suitable physical conditions to provide all aspects of the program's pertinent curriculum in accordance with its specified goals and objectives. There shall be sufficient space for storing records and materials, consultation with students, and in general enabling the program's personnel to function effectively and efficiently. All physical spaces shall be maintained in good repair, are clean and attractive, with adequate lighting, ventilation, power and water supplies, waste disposal, and furnishings. If the space used by the program is provided on a lease, the lease shall specify how space requirements are met and responsibility assigned.

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## III. Curriculum

### **Instruction must follow a plan consistent with a body of knowledge based on the observations and discoveries of Dr. Maria Montessori as reported in her various pertinent writings and publications since 1907 which documents:**

#### **A. Learning experiences and subject matter sequencing which develops the competencies of a Montessori teacher.**

*Criteria* — The program documents its plan of sequenced learning experiences specifying the various time frames, format and subject matter which is offered in each component of the curriculum. The program describes its basic outline of content and learning experiences with associated objectives consistent with the competencies of a Montessori teacher.

The program shall have a policy of encouraging students to engage in and practice Montessori teaching with children during the program -- either in the operation of their own environment or employment or volunteer assistance in an existing school for children in the age range of the program. [*Guidelines: This practical teaching experience is advisably integrated and incorporated into the subject matter of other components of the curriculum*]

#### **B. Clearly written learning objectives and competencies to be achieved consistent with being a Montessori teacher.**

#### **C. Periodic evaluation of students to assess knowledge, progress and skill in the competencies delineated in the program objectives consistent with the description of a Montessori teacher.**

*Criteria* — Periodic evaluation shall be promptly provided to the student in writing during the program and shall be based on the judgment of complete and satisfactory accomplishment with regard to the assigned subject matter. A record of such written evaluation shall be retained by the program together with other documents pertaining to the student's participation in the program.

Any qualifications to meet curriculum requirements by advance placement or credit for prior experiential learning shall be uniformly applied and fully disclosed to students as policy and practice which is specifically described and clearly justified with reference to the program's purpose

and pertinent curriculum objectives. The program shall receive no unreasonable financial gain from the student for such advance placement or credit. *[Guidelines: Such qualifications are ordinarily limited strictly to experience within the prior operation of the program itself. Satisfactory participation in other similar program(s) may be credited for advance placement in the current program only to the extent that all pertinent curriculum components have been verified as in substantial compliance with that of the current program. Such advance placement for prior learning is therefore considered for application only in exceptional and rare situations. Uniformity, consistency and integrity of program operation compel a strong preference for strict compliance with all curriculum requirements within the confines of the current program operation. Any qualifications employed as to advance placement and credit for prior learning will therefore be subjected to the highest standards of scrutiny and justification.]*

## IV. Students

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### A. Program Description

**Students shall be provided with a clear description of the program and its content, including learning goals, program objectives, required competencies, and other educational assignments.**

*Criteria* — Instructions for completion of assignments shall be clearly provided to the student in writing. Students shall be clearly informed in writing of specific objectives of such assignments.

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### B. Admission Policies and Procedures

**Admission of students shall be made in accordance with the clearly defined and published practices of the sponsoring institution. Any specific academic and technical standards required for admission to the program shall be clearly defined and published.**

*Criteria* — The admission policy and practice with regard to student recruitment and enrollment shall provide reasonable assurance that students have sufficient physical health, communication skills and basic intellectual capacity to satisfactorily complete all program requirements and to function as an effective Montessori teacher. Students admitted to the program shall give evidence of completion of a basic level of general education. *[Guidelines: high school level education or such other equivalent level of educational background is acceptable as a minimum]* Admission of students shall be made in accordance with criteria which assure a basic alignment between the student's purpose and that of the program. *[Guidelines: Recommended admission requirements include: evidence of student's prior educational experience; student's written statement of purpose in taking the program; three references as to the student's character and general educational ability and interest in children; student's written description of a Montessori environment.]*

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### C. Evaluation

**Criteria for successful completion of each segment of the curriculum and for graduation shall be given in advance to each student. Evaluation systems shall reasonably relate to the objectives and competencies described in the curriculum and include an on-going program of evaluation of outputs consistent with such objectives and competencies. Such evaluation shall be employed frequently enough to provide both students and program officials with timely indication of the student's progress and to serve as a reliable indicator of the effectiveness of instruction and curriculum design.**

*Criteria* — Program officials and instructional staff shall be identified for their responsibility in determining compliance with evaluation criteria. All such continuing and final evaluation shall be conducted in such a manner to assure fair and impartial consideration to all students.

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## D. Guidance

### **Student guidance shall be available to include assisting students in understanding and observing program policies and practices.**

*Criteria* — The program shall have a policy and practice of student guidance which encourages correction and resolution of any unfavorable evaluations through clear and complete communication with respect to incomplete or unsatisfactory assignments. The program shall provide counsel and advice to students experiencing difficulty in meeting the required objectives and requirements. Grievance procedures and policies applied with students shall be equitable, comprehensive and offer timely resolution.

## V. Operational Policies

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### A. Fair Practices

- 1. Announcements and advertising must accurately reflect the program offered.**
- 2. Student recruitment and admission practices and faculty recruitment and employment practices shall be non-discriminatory with respect to race, color, creed, sex, age or national origin.**
- 3. Program certification, academic credit and costs to the student shall be accurately stated and published and made known to all applicants.**
- 4. Policies and processes for student withdrawal, dismissal, retention, attendance and refunds of tuition and fees, shall be published and made known to all applicants.**

*Criteria* — A catalog or other official publication of the program shall be provided to the prospective student prior to enrollment. Such publication shall include at least the following information: purpose and objectives of the program; general program completion requirements; name, address, and telephone number, if any, of the sponsoring institution; brief description of the curriculum and schedule; name(s) and academic background of the faculty; tuition and fees; admission procedures and requirements; name(s) of owner or governing body of the sponsoring institution; and any other material facts about the sponsoring institution and program as are likely to affect the decision of students to enroll in such program.

#### Withdrawal, Dismissal and Retention

Students shall be retained in the program provided generally that satisfactory progress is maintained in meeting the objectives and requirements of the program. The program shall have a clearly written dismissal and withdrawal policy stating fair and equitable grounds upon which such termination from the program may occur.

[Guidelines: Dismissal grounds may include the following:

- (1) Failure to complete required assignments within a reasonable period of time;
- (2) Failure to meet the minimum attendance requirements during any classroom instruction periods;

*(3) Failure to make tuition payments when due.]*

In the event a student is dismissed or withdraws or other adverse action or conditions are applied to the detriment of the student based on improper or unsatisfactory performance or the student's extreme dissatisfaction with the program, a grievance procedure shall be available to enable the student to submit a written complaint to the program stating such facts as may support the student's claim and position in the matter. The procedure shall entitle the student to have such complaint submitted to an impartial third party for investigation and hearing. *[Guidelines: Grievance procedures with regard to dismissal, withdrawal or a student's complaint with respect to the operation of the program may require that the complaint be written, stating the grievance specifically, the name of the program official or instructor involved in the matter and any other specific statements relative to the cause of action.]*

The program shall cooperate in resolving issues of fact relative to grievance procedures by providing on request of third party investigator(s), pertinent testimony and documentation. *[Guidelines: On completion of the investigation and hearing, the third party investigator(s) should decide the matter and submit a written recommendation to the program director who shall reconsider the adverse action based on the decision of the investigator(s).]*

The decision of the third party investigator(s) and all pertinent related data of the investigation relative to grievance procedures shall be maintained with the student's records and shall be available for review with regard to matters of accreditation.

### Attendance Policy

The sponsoring institution shall establish and publish an attendance policy, if appropriate, which provides that absences shall be recorded and a set percentage of attendance or number of absences shall constitute grounds for dismissal from the program or disqualification for certification. Students shall be provided with any applicable attendance policy in writing and advised as to its applicability at the beginning of the program. *[Guidelines: for all portions of the program which involve classroom instruction, on-time attendance at all sessions shall be required and no more than 10% absence in this regard shall be permitted to allow a student to receive appropriate certification credit. Provision shall be made for satisfying requirements not met due to absence; such requirements being directly related to content or experience missed]*

### Graduation

Students having satisfactorily completed all program requirements shall be entitled to receive a certificate, diploma or other acknowledgment which provides written evidence of such completion. The document of program completion shall specify the name of the issuing institution, date document issued, name of recipient, brief description of program content and any other material facts to distinguish and otherwise identify the document. Such document of completion shall not be issued until and unless all program requirements and conditions for certification have been fully and successfully satisfied. Students denied certification shall be entitled to a fair and impartial grievance procedure.

### Ethical Practices

The sponsoring institution shall maintain a policy of integrity and commitment to ethical practices and complete honesty in dealing with students, faculty and other parties with regard to the operation of the program. The program shall be educational and students shall be required to actively engage in educational experiences during all aspects of the program operation. Published materials and recruiting personnel make only justifiable claims regarding the nature of the program, occupational placement, advancement, salaries and other financial benefits relevant to Montessori teaching and applicable career fields; program statements support a commitment to integrity and ethical practices on the part of all participants.

Policies and procedures by which students may perform required practical service work (e.g., internship, student teaching) while enrolled in the program must be published and made known to all concerned. Such practical service work must be supervised and evaluated and integrated with the other areas of program operation.

The health and safety of students and faculty shall be adequately safeguarded. *[Guidelines: It is suggested that the sponsoring institution have adequate insurance to provide protection to the program, employees and students against liability cases.]*

## Enrollment

Student enrollment shall be acknowledged in a written document which may be in the form of a "contract", "agreement", "application" or a combination of such forms. The enrollment document shall include at least the following on the same sheet or firmly attached thereto: name and address of sponsoring institution; title or designation of program; tuition amount; signature of representative of sponsoring institution and student. The sponsoring institution shall provide a signed copy of the enrollment document to the student.

## Tuition Refund Policy

In the event a student or applicant cancels enrollment or otherwise leaves the program, whether by withdrawal or dismissal, prior to completion of the program, the sponsoring institution shall promptly refund to each such student or applicant the unused portion of paid tuition fees and other charges or reduce the amount due under the conditions stated in the enrollment document or program catalog in accordance with the following standards:

The tuition refund policy shall be written and provided to students before entering the program and shall provide that in the event the student fails to enter the program, or withdraws, or is discontinued therefrom, the amount charged to the student for tuition, fees and other charges for the portion of the program completed shall not exceed the approximate pro-rata portion of the total charges for tuition, fees and other charges based on the value that the completed portion of the program bears to the total value of the program as determined by the number of lessons, hours of classroom instruction, length of time, or any other reasonable unit of value, or combination of units of value, as shall be reasonable under the circumstances; provided, however, that no refunds are required after completion of 50% of the program or respective portion thereof.

[Guidelines: Acceptable pro-rata refund should be based on amount of program content completed and should not be less than: 0-10% = 90% refund; 10-25% = 75% refund; 25-50% = 50% refund; over 50%, no refund.]

All moneys due and owing to the student shall be refunded within a reasonable period of time following notification of the student's leaving the program. [Guidelines: A reasonable period for refund should not exceed 30 days from date of notice of withdrawal.]

If the sponsoring institution closes, cancels or otherwise discontinues the program, the students entitled to a refund under the applicable program policy shall receive a full refund of all moneys paid or other equivalent compensation to the full satisfaction of each student. [Guidelines: the sponsoring institution is advised to consider what means are available to satisfy students as an alternative to a full refund of all moneys paid; e.g., completion of a similar program conducted elsewhere or at another time]

## Cancellation Policy

The sponsoring institution shall have a cancellation and settlement policy that permits a potential student to cancel any enrollment document and receive a refund of all moneys paid to the sponsoring institution, provided no classes have been attended, lessons completed, or materials used; provided, however, that notification of such cancellation shall have been communicated to the sponsoring institution within 72 hours after the enrollment document was signed by the prospective student or was otherwise made effective. Means of such notification may be specified by the sponsoring institution, if provided in writing to the student with the enrollment document or program catalog.

If the sponsoring institution specifies that the notification of cancellation shall be in writing, notice shall be considered properly given when it is correctly addressed and deposited in a mail box with postage pre-paid. The sponsoring institution shall acknowledge receipt of notice of cancellation. [Guidelines: The sponsoring institution may require that the notice of cancellation be given by certified or registered mail provided this requirement is clearly stated with the enrollment document or program catalog. It is understood that after the expiration of the indicated cancellation period, a reasonable non-refundable registration fee may be charged not to exceed 10% of the total tuition cost.]



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## B. Student Records

**Satisfactory records shall be maintained for student admission, participation and evaluation. Evidence of program completion by graduates shall be maintained by the sponsoring institution for a reasonable period of time after graduation.**

*Criteria* — The sponsoring institution shall maintain a file for each student enrolled which contains the following information: educational background including transcripts of college credits and other academic credentials, if any; attendance records; record of assignments and evaluations; enrollment document; all correspondence with the student pertinent to participation in the program; document(s) showing satisfactory completion of all program requirements and the status of student upon termination of enrollment, as the case may be; and any other pertinent written documents relating to the student's participation in the program. Such records shall be held by the sponsoring institution for at least five years after completion of the program or after withdrawal or dismissal and shall be available for inspection in conjunction with any proper accreditation matters. The sponsoring institution shall provide for the permanence of retaining student completion documents and related evidence of participation in the event that the program and/or the sponsoring institution shall discontinue operation.

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## IV. Program Evaluation

**A. The program must have a continuing system for periodically and systematically reviewing the effectiveness of the program including a formal self-study.**

**B. The results of program evaluation must be appropriately reflected in review of the curriculum and other elements of the program with appropriate revision .**

*Criteria* — The sponsoring institution shall establish a procedure for periodic review of the program's effectiveness and satisfaction to all parties concerned. This procedure shall validate and measure the quality of outcome results of the program operation through the continuing evaluation of students and graduates. [*Guidelines: Such evaluation should include follow-up studies and surveys of graduates with regard to their practical teaching experience and performance; input from various persons or groups, such as employers, advisory committees and other students and graduates .*]

# Appendix B

## ACCREDITATION CATEGORIES

### Policy Statements

#### The Council

- Maintains a clearly written definition of each accreditation category and action.
- Provides clearly written procedures for the appeal of adverse actions.
- Maintains the accreditation status of a program pending disposition of an appeal.
- Permits an institution sponsoring a program to withdraw a request for initial or continuing accreditation at any time prior to the final accreditation action.
- Regards as graduates of a Council-accredited program all students who have successfully completed a program granted any accreditation category at any time during their enrollment.

### Underlying Provisions

The Generic Review Committee uses the following categories when determining accreditation recommendations to be forwarded to the Council. These recommendations are based on the committee's evaluation of the extent to which an educational program complies with the **Essentials and Criteria**. The committee does not need to use all of the categories of accreditation, but it may not add any without the approval of the Council.

The Generic Review Committee determines its recommended accreditation actions only after the chief executive officer of the sponsoring institution and the director of the program have been given an opportunity to comment to the committee on the findings and conclusions of the visiting team. The Site Visit Report remains the property of the institution.

### Awarding Accreditation

Accreditation reviews are scheduled at intervals appropriate to the duration of accreditation approved. When warranted, a site visit may be conducted before the end of the period for which accreditation was awarded.

The sponsoring institution of a program may withdraw the application for accreditation at any time before the Council considers the recommendation forwarded by the review committee.

Students successfully completing a program granted any of the following accreditation categories at any time during their enrollment as students are regarded as graduates of a Council-accredited program.

## 1. Provisional Accreditation

**Provisional Accreditation** is granted to a new program that is in an early stage of operation and has not yet graduated any students. The accreditation review process, including a site visit, indicates that the program, when fully operational, will be in substantial compliance with the **Essentials and Criteria**.

The sponsoring institution is expected to continue to develop the program according to its plan. A second site visit is conducted when the first student(s) are near graduation or have graduated.

## 2. Accreditation

**Initial or continuing Accreditation** may be granted when the accreditation review process confirms that the program is in substantial compliance with the **Essentials and Criteria**. The term "initial" is used to indicate that although the program may have students near graduation or may have graduated several classes of students, it is being accredited for the first time.

For a program that is in substantial compliance with the **Essentials and Criteria** except for one or more specific deficiencies that are believed to be readily correctable, the Generic Review committee may recommend either (a) the five-year maximum duration of accreditation or (b) a reduced duration of accreditation.

- (a) When the Generic Review Committee recommends the maximum five-year duration, it requires evidence documenting correction of any cited deficiencies by a specific date. The Council notification letter contains a clear statement of each deficiency and a due date for a progress report or plan of correction.

Upon committee recommendation, the Council may inform the appropriate officials of the sponsoring institution that failure to submit a satisfactory progress report or plan to correct the deficiencies may result in reduction of the length of accreditation, an early accreditation review, or other appropriate action.

- (b) When a review committee recommends a reduced duration of accreditation for a program with deficiencies that are believed to be readily correctable, it may require a documented progress report by a specific date. In such cases, the Council may inform the appropriate officials of the sponsoring institution that, based on documented correction of the deficiencies, the accreditation award may be extended to the approved maximum five-year duration without requiring a new Self-Study Report and site visit.

If the committee recommendation on which a reduced duration of accreditation award is based does not require a progress report, another site visit is conducted near the end of the time for which the program is accredited.

### 3. Accreditation with Qualification

The Generic Review Committee may elect to recommend **Accreditation with Qualification** for programs seeking **Provisional Accreditation** or **initial** or **continuing Accreditation** when such programs demonstrate marginal compliance with some specific **Essentials** or **Criteria**. The Council accreditation letter contains a clear statement of each deficiency and of the requirement of the Generic Review Committee for one or more progress reports.

Upon committee recommendation, the Council informs the appropriate officials of the sponsoring institution that when all qualifications have been removed and the program has returned to substantial compliance with the **Essentials and Criteria**, the review committee will recommend to the Council an appropriate additional duration of accreditation, without requiring a new Self-Study Report and site visit.

### 4. Probationary Accreditation

**Probationary Accreditation** is granted when the program is not in compliance with the **Essentials and Criteria** and the deficiencies are so serious that the capability of the program to provide acceptable educational experience for the students appears to be threatened. As a condition of granting such **Probationary Accreditation** status, the program must provide a written statement of the program's intent and willingness to correct the cited deficiencies within the prospective time period specified.

Most assignments of **Probationary Accreditation** are based on evidence substantiated by a site visit. However, if the cited deficiencies are not in dispute, a review committee may recommend **Probationary Accreditation** without conducting a site visit.

**Probationary Accreditation** is usually limited to one year. It may not extend beyond two years. The period of **Probationary Accreditation** may be as short as thirty days.

The Generic Review Committee provides an opportunity for reconsideration prior to Council action (see Review Committee Reconsideration). Council awards of **Probationary Accreditation** following the committee's reconsideration of a recommendation are final and are not subject to appeal. During a period of **Probationary Accreditation**, programs are recognized and listed as being accredited.

The Council accreditation letter contains a clear statement of each deficiency contributing to the failure to be in substantial compliance with the **Essentials and Criteria**. The letter also indicates that 1) a progress report is required by a specific date; 2) failure to come into substantial compliance with the **Essentials and Criteria** will result in the withdrawal of accreditation; and 3) currently enrolled students and those seeking admission should be advised that the program is on probation.

## 5. Probationary Accreditation -- Administrative

**Probationary Accreditation -- Administrative** may be granted when the program does not comply with one or more of the administrative requirements for maintaining accreditation, which include:

- (a) Submitting the Self-Study Report or a required progress report within a reasonable period of time, as determined by the Generic Review committee.
- (b) Agreeing to a reasonable site visit date before the end of the period for which accreditation is awarded.
- (c) Informing the Generic Review Committee within a reasonable period of time of changes in program personnel, as required by the **Essentials and Criteria**.
- (d) Paying Council or review committee accreditation fees and charges within a reasonable period of time, as determined by the Council or the Generic Review Committee.
- (e) Completing and returning by the established deadline the Annual Report provided by the Council.

Prior to the Council placing a program on **Probationary Accreditation — Administrative** for failure to file an Annual Report following due notice, the Council informs the appropriate officials of the sponsoring institution and the Generic Review Committee that this action is being considered.

Prior to the Council's placing a program on **Probationary Accreditation — Administrative** for other reasons, the Generic Review Committee or the Council informs the sponsoring institution of the relevant requirements, policies, and procedures and of the recommendation that may lead to this type of **Probationary Accreditation**.

**Probationary Accreditation — Administrative** is an Accreditation category and is not subject to appeal. The Generic Review Committee is not required to provide opportunity for reconsideration prior to Council action. During a period of **Probationary Accreditation — Administrative**, programs are recognized and listed as being accredited.

## Denying Accreditation

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### 1. Accreditation Withheld

A program seeking **Provisional Accreditation** or initial **Accreditation** may have **Accreditation Withheld** if the accreditation review process confirms that the program is not in substantial compliance with **Essentials and Criteria** that are vital to the educational program.

The appropriate official is provided with a clear statement of each deficiency and is informed that application for accreditation as a new applicant may be made whenever the program is believed to be in substantial compliance with the **Essentials and Criteria**.

### **Opportunity for Review Committee Reconsideration and/or Appeal to the Council**

Prior to Council action, the Generic Review Committee provides an opportunity for reconsideration of its recommendation to withhold accreditation (see "Review Committee Reconsideration"). The letter informing the appropriate official of the accreditation recommendation describes the reconsideration process. This process will be designed to expedite requests for reconsideration.

The Council letter notifying the appropriate official that the program has had **Accreditation Withheld** for failure to be in substantial compliance with **Essentials and Criteria** indicates that the institution may appeal the decision. A copy of the "Council Appeals Procedures for **Accreditation Withheld** or **Withdrawn**" is enclosed.

## **2. Accreditation Withdrawn**

Students enrolled in the program at the time the sponsoring institution is notified that accreditation has been withdrawn may complete the requirements for graduation and will be considered graduates of a Council accredited program.

- (a) **Accreditation Withdrawn - Voluntary** (at the request of the sponsoring institution)
- (b) **Accreditation Withdrawn - Involuntary** (for failure to be in substantial compliance with the **Essentials and Criteria** or with administrative requirements)

Accreditation may be involuntary withdrawn from a program with **Probationary Accreditation** or **Probationary Accreditation -- Administrative** if, at the conclusion of the specified probationary period, the accreditation review process confirms that the program is not in substantial compliance with the **Essentials and Criteria** or with administrative requirements for maintaining accreditation. (See "Moving from One Accreditation Category to Another".)

The appropriate official is provided with a clear statement of each deficiency and is informed that the sponsoring institution may apply for accreditation as a new applicant whenever the program is believed to be in substantial compliance with the **Essentials and Criteria** and with administrative requirements for maintaining accreditation.

### **Opportunity for Review Committee Reconsideration and/or Appeal to the Council**

Prior to Council action, the Generic Review Committee provides an opportunity for reconsideration of a recommendation to withdraw accreditation (see "Review Committee Reconsideration").

The letter informing the appropriate official of the accreditation recommendation describes the reconsideration process. This process is designed to expedite requests for reconsideration.

The Council letter notifying the appropriate officials that the program has received **Accreditation Withdrawn — Involuntary** indicates that the institution may appeal the decision. A copy of the Council Appeals Procedures for **Accreditation Withheld** or **Withdrawn** is enclosed.

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## **Moving from One Accreditation Category to Another**

**From Provisional Accreditation:** If the accreditation review process confirms that a program, after at least one student has graduated, is in substantial compliance with the **Essentials and Criteria** and with administrative requirements, the program may be awarded **continuing Accreditation**. If the program is in marginal compliance, the Council may grant **Accreditation with Qualification**. If the program is not in compliance, the Council may grant **Probationary Accreditation** (including **Probationary Accreditation — Administrative**) or **Accreditation Withdrawn**.\*

**From initial or continuing Accreditation:** If the accreditation review process confirms that a program is in substantial compliance with the **Essentials and Criteria** and with administrative requirements, the program is awarded continuing Accreditation. If the program is in marginal compliance, the Council may grant **Accreditation with Qualification**. If the program is not in compliance with the standards and requirements, the Council may grant **Probationary Accreditation** (including **Probationary Accreditation — Administrative**) or **Accreditation Withdrawn**.\*

**From Probationary Accreditation (including Probationary Accreditation — Administrative):** If the accreditation review process confirms that a program has corrected the identified deficiencies leading to probation and is in substantial compliance with the **Essentials and Criteria** and with administrative requirements, the program is awarded **continuing Accreditation**. If the identified deficiencies are not corrected within the specified probationary period, the Council may grant **Accreditation with Qualification**, an extension of **Probationary Accreditation**, or **Accreditation Withdrawn**.\*

**From Accreditation with Qualification:** If the accreditation review process confirms that a program has corrected the deficiencies identified as qualifications and is in substantial compliance with the **Essentials and Criteria**, and with administrative requirements, the program is awarded **continuing Accreditation**. If the qualifications are not removed within the specified period, the Council may grant **Probationary Accreditation** or **Accreditation Withdrawn**.\*

The accreditation review process usually provides a period of **Probationary Accreditation** to allow programs that are not in substantial compliance with the **Essentials Criteria** to have a specific period in which to achieve and demonstrate compliance.

\*In unusual circumstances, such as evidence of critical deficiencies that appear to be irremediable within a reasonable length of time or a documented threat to the welfare of current and potential students, the Council, upon recommendation from the Generic Review Committee, may withdraw accreditation without first providing a period of probation. Programs from which accreditation is involuntarily withdrawn without a probationary period are ensured due process, as described in "Review Committee Reconsideration" and in "Council Appeals Procedures for Accreditation Withheld or Withdrawn".

# **Appendix C**

## **Program Site visit Questionnaire (PSQ)**

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### **Policy**

The Council, in cooperation with the Generic Review Committee, evaluates the effectiveness of the accreditation review process,

### **PSQ Procedure**

To assist in these evaluation efforts, a Program site Visit Questionnaire (PSQ) is distributed to program directors to solicit information on (1) the arrangements for the site visit, (2) the performance of the site visit team, (3) the participation of institutional personnel in conducting the self-study and preparing the Self-Study Report, and (4) suggestions for improving the overall program review process.

The PSQ is sent to the program director by the Council or the Generic Review Committee at the time of the site visit. Both program directors and other administrators return the evaluations to the Council. Upon receipt, they are shared with the appropriate staff and Generic Review Committee.

## **Sample Cover Letter with PSQ**

Dear Program Director:

The agency International Montessori Accreditation Council, in cooperation with review committees, accredits Montessori teacher education programs and shares responsibility for evaluating the effectiveness of the accreditation process.

The Council asks you to assist in these evaluation efforts by completing the enclosed Program Site Visit Questionnaire (PSQ). The evaluation has been designed to provide feedback about (1) the arrangements for the site visit, (2) the performance of the site visit team, (3) the participation of institutional personnel in conducting the self-study and preparing the Self-Study Report, and (4) suggestions for improving the overall program review process.

When you return the PSQ, I will share it with the appropriate staff member and the review committee.

A self-addressed envelope has been enclosed for your convenience. Thank you for your contribution to our efforts to improve the effectiveness of the accreditation process.

Sincerely,

Executive Director  
International Montessori Accreditation Council



# International Montessori Accreditation Council

## Program Site Visit Questionnaire (PSQ) Form

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(to be completed by the program director or a designated program representative.)

Name of sponsoring institution: \_\_\_\_\_

Date(s) visited: \_\_\_\_\_

Type/Level of program(s): \_\_\_\_\_

Address of Program: \_\_\_\_\_

### Arrangements for the Site Visit

Please circle the item which best describes your response to each statement below with respect to arrangements for the site visit.

1. Overall site visit arrangements by the review committee were:

Adequate

Inadequate

Comment:

2. Availability of the review committee to assist the program in preparing for the site visit was:

Adequate

Inadequate

Comment:

3. Communication of the review committee with the program before the site visit was:

Adequate

Inadequate

Comment:

4. The time that elapsed between the submission of your Self-Study Report and the site visit,

\_\_\_\_\_ months, was:

Adequate

Inadequate

Comment:

5. The number of site visit team members, \_\_\_\_\_, was:

Adequate

Inadequate

Comment:

### Performance of the Site Visit Team

Please circle the number of the single item which best describes your response to each statement below regarding performance of the site visit team. The numbers correspond to the following values:

1. Excellent
2. Good
3. Satisfactory
4. Fair
5. Poor

6. The site visitors' attitude while conducting the site visit was:

1                      2                      3                      4                      5

Comment:

7. The site visitors' competence as surveyors/evaluators was:

1                      2                      3                      4                      5

Comment:

8. The site visitors' knowledge of the program through their study of the application and/or Self-Study Report was:

1                      2                      3                      4                      5

Comment:

9. The site visitors' objectivity in interpreting and applying the **Essentials and Criteria** to the program was:

1                      2                      3                      4                      5

Comment:

10. The site visitors' interaction with program faculty members during the site visit was:

1                      2                      3                      4                      5

Comment:

11. The site visitors' interaction with other related program staff or personnel during the site visit was:

1                      2                      3                      4                      5

Comment:

12. The site visitors' interaction with students during the site visit was:

1                      2                      3                      4                      5

Comment:

13. The conduct of the exit conference was:

1                      2                      3                      4                      5

Comment:

14. The clarity of the summary response during the exit conference was:

1                      2                      3                      4                      5

Comment:

## The Accreditation Process

15. Rate the involvement of program and other institutional personnel in:

conducting the self-study process

1                      2                      3                      4                      5

preparing the Self-Study Report

1                      2                      3                      4                      5

participating in the site visit

1                      2                      3                      4                      5

Comment:

16. In its value to your program, rate these aspects of the accreditation review process:

self-study process

1                      2                      3                      4                      5

Self-Study Report

1                      2                      3                      4                      5

site visit

1                      2                      3                      4                      5

Comment:

17. In your judgment, the effectiveness of the overall Council accreditation system is:

1                      2                      3                      4                      5

Comment:

**Suggestions for Improvement**

18. You are invited to share ideas for improving the accreditation review process.

\_\_\_\_\_  
Name (Please print or type)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

(    )  
\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Signature

Thank you for your response to this Program site Visit Questionnaire (PSQ). Please return it in the enclosed envelope. Should you have any questions about this form, call (301) 589-1127, or write:

International Montessori Accreditation Council  
9525 Georgia Ave. #200  
Silver Spring, MD 20910

For Office Use:

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

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

# Appendix D

## Application for Initial or Continuing Accreditation

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Signed by the chief executive officer of the sponsoring institution, this application is a request that the Council and the appropriate program review committee begin the process of accreditation review of the applicant program (refer to the Council’s “Accreditation Handbook” for process summary and other general information).

The Council’s accreditation is initiated only at the request of the institution sponsoring the Montessori teacher education program. It provides peer review of the program’s educational content and operation, a review based on recognized educational standards called **Essential and Criteria**. These standards have been adopted by appropriate collaborating organizations review committees and the Council.

Once the program is accredited by the Council, some of the following information will be printed in the annual publication of the Council Directory. *Please type or print information.*

### Sponsoring Institution

(      )

|      |           |
|------|-----------|
| Name | Telephone |
|------|-----------|

|        |      |       |          |         |
|--------|------|-------|----------|---------|
| Street | City | State | Zip Code | Country |
|--------|------|-------|----------|---------|

### Program Information

(      )

|      |           |
|------|-----------|
| Name | Telephone |
|------|-----------|

|        |      |       |          |         |
|--------|------|-------|----------|---------|
| Street | City | State | Zip Code | Country |
|--------|------|-------|----------|---------|

|                          |  |
|--------------------------|--|
| Type/Level of program(s) | Montessori Affiliation (intended/actual) |
|--------------------------|--|

|                                  |                       |
|----------------------------------|-----------------------|
| Length of program (e.g., months) | Certification granted |
|----------------------------------|-----------------------|

Month and year program first accepted  
students or intends to accept students

|       |      |
|-------|------|
| Month | Year |
|-------|------|

## Review Committee

(State Selection for Council Accreditation)

**Generic Review Committee**

**IMS Review Committee**

## Sponsoring Institution Officials

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Chief executive officer (print)

Title

---

Signature authorizing this application

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Mailing Address (if different from sponsoring institution's address)

---

## Program Officials

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Program Director

Title

( )

Telephone

Please return the completed Application Form with application fee of \$600 (payable to "IMAC") to:

### International Montessori Accreditation Council

9525 Georgia Ave. #200  
Silver Spring, MD 20910 USA  
Tel. (301) 589-1127