

**STATEMENT OF BASIC ACCREDITATION PRINCIPLES
FOR ACCREDITATION OF
MONTESSORI TEACHER EDUCATION PROGRAMS**

by the agency

**INTERNATIONAL MONTESSORI
ACCREDITATION COUNCIL (IMAC)**

with accompanying

**ESSENTIALS AND CRITERIA
ARTICLES OF ASSOCIATION**

Inquiries to:

Lee Havis

International Montessori Accreditation Council

9525 Georgia Avenue #200

Silver Spring, Maryland 20910

Tel: (301) 589-1127

STATEMENT OF BASIC ACCREDITATION PRINCIPLES

TABLE OF CONTENTS

General Overview of Accreditation	i
Definition of Terms	ii

	<u>Page</u>
I. OPERATING PROVISIONS	1
A. GENERAL POLICY STATEMENTS	1
B. SUMMARY OF COUNCIL ORGANIZATION	1
1. General	1
2. The Council	2
(a) <u>Advisory Committee</u>	2
(b) <u>Board of Directors</u>	3
(c) <u>Program Delegates</u>	4
3. Collaborating Organizations	4
4. Review Committees	4
5. Organizational Chart of the Council	5
C. COLLABORATIVE RELATIONSHIP	6
1. Policy Statements	6
2. Nature of Collaborative Relationship	6
3. Establishing a Collaborative Organization	6
4. Discontinuing a Collaborative Relationship	7
(a) <u>Voluntary Discontinuation</u>	7
(b) <u>Involuntary Discontinuation</u>	7
D. REVIEW COMMITTEE STRUCTURE, FUNCTIONS AND RESPONSIBILITIES	8
1. Policy Statements	8
2. Review Committees and the Collaborative Relationship	8
3. Review Committee Structure	9
4. Review Committee Functions	10
(a) <u>Determining the appropriateness of a site visit</u>	10
(b) <u>Conducting the accreditation review</u>	10
5. Interactions Between Review Committees and the Council	10
(a) <u>Attending Meetings</u>	10
(b) <u>Quality Assurance Program</u>	11
(c) <u>Maintaining Records</u>	11
(d) <u>Communicating with Programs</u>	11
E. CLASSIFICATION OF ACCREDITATION ACTIONS	12

1. Policy Statements.....	12
2. Underlying Provisions	12
(a) <u>Awarding Accreditation</u>	12
(b) <u>Provisional Accreditation</u>	12
(c) <u>Accreditation</u>	13
(d) <u>Accreditation with Qualification</u>	13
(e) <u>Probationary Accreditation</u>	13
(f) <u>Probationary Accreditation–Administrative</u>	14
3. Denying Accreditation	15
(a) <u>Accreditation Withheld</u>	15
(i) Opportunity for Review Committee Reconsideration and/or Appeal to the Council	15
(b) <u>Accreditation Withdrawn</u>	15
(i) Accreditation Withdrawn–Voluntary	15
(ii) Accreditation Withdrawn – Involuntary	15
(iii) Opportunity for Review Committee Reconsideration and/or Appeal to the Council	16
4. Moving from One Accreditation Category to Another	16
(a) <u>From Provisional Accreditation</u>	16
(b) <u>From initial or continuing Accreditation</u>	16
(c) <u>From Probationary Accreditation</u>	16
(d) <u>From Accreditation with Qualification</u>	16
(e) <u>Use of Probationary Accreditation</u>	16

II. EVALUATION PRACTICES AND PROCEDURES

A. PROGRAMMATIC SELF-STUDY.....17

1. Policy Statements.....	17
2. The Focus of Programmatic Self-Study	18
3. Variables Affecting Self-Study	18
4. Variety of Modes Permissible in Self-Study	18
5. Prerogatives of the Sponsoring Institution and its Programs ...	18
6. Participants in the Self-Study Process	18
7. Documentation of Self-Study in the Self-Study Report.....	19
8. Content and Sequence of the Self-Study Report.....	19
9. Presentation and Use of the Self-Study Report.....	19

B. RECOMMENDED FORMAT FOR THE SELF-STUDY REPORT AND ITS EVALUATION.....19

1. Policy Statements.....	19
2. Procedure	19
3. Self-Study Report	20
4. Evaluation for Potential Compliance Format	21

C. PROGRAMMATIC SITE VISIT.....30

1. Policy Statements.....	30
---------------------------	----

D. RECOMMENDED FORMAT FOR THE SITE VISIT REPORT

..... **31**
1. Policy Statement 31
2. Procedure 31
3. Site Visit Report 31

E. COORDINATED AND CONCURRENT SITE VISITS 35

1. Policy Statements..... 35
2. Procedures for Coordinated and Concurrent Site Visits 35
 (a) Institutional Coordinator..... 35
 (b) Administrative Generalist 35
 (c) Site Visitors 36

F. CONDUCTING THE SITE VISIT 36

General Orientation Guide to Programmatic Accreditation, setting forth Procedures of the IMAC Generic Review Committee, including:
Chart I: Ten Commandments of the Site Visit Team 49
Chart II: Characteristics of Successful Site Visitors 50
Appendix C: Program Site Visit Questionnaire 51
Appendix D: Council Application for Initial and Continuing Accreditation 57

III. ADMINISTRATIVE PRACTICES AND PROCEDURES

A. GUIDELINES FOR ADVERTISING ACCREDITATION

STATUS..... 59
1. Policy Statements..... 59

B. DURATION OF ACCREDITATION AND CONDUCTING ACCREDITATION REVIEWS AT REASONABLE INTERVALS

..... **59**
1. Policy Statements..... 59
2. Duration of Recognition..... 60
3. Procedures 60

C. FEES FOR ACCREDITATION SERVICES 60

1. Policy Statements..... 60
2. Fees to Council 60
3. Application Fee 61
4. Annual Program Accreditation Fee 61

D. ANNUAL REPORT 62

IV. PUBLIC RESPONSIBILITY 63

A. CONFLICT OF INTEREST 63

1. Policy Statements.....	63
2. Provisions to Avoid Conflict of interest in the Site Visit Process.....	63
B.COMPLAINTS REGARDING ACCREDITED PROGRAMS	63
1. Policy Statement	63
2. Procedures	63
C.REVIEW COMMITTEE RECONSIDERATION OF RECOMMENDATIONS OFACCREDITATION WITHHELD, ACCREDITATION WITHDRAWN, AND PROBATIONARY ACCREDITATION.....	65
1. Policy Statement	65
2. Review Committee Reconsideration of Recommendations to Withhold or Withdraw Accreditation.....	65
3. Review Committee Reconsideration of Recommendations of Probationary Accreditation.....	66
D.COUNCIL APPEALS PROCEDURES FOR ACCREDITATION WITHHELD OR WITHDRAWN	66
1. Policy Statement	66
2. Criteria for and Initiation of an Appeal	66
3. Criteria for Selecting an Appeals Hearing Panel	67
4. Process for Selecting an Appeals Hearing Panel.....	67
5. Appeals Hearing Date and Participants	67
6. Appeals Hearing Panel Recommendation and Final Council Action	67
7. Financial Responsibility for an Appeals Hearing	68
8. Extensions of Time Limits	68
E.RIGHTS AND RESPONSIBILITIES OF INSTITUTIONAL SPONSORS OF PROGRAMS ACCREDITED BY THE COUNCIL	68
1. Introduction	68
2. General Rights	68
3. Specific Rights and Responsibilities	69
(a) Sponsorship.....	69
(b) Resources.....	70
(c) Students	70
(d) Fair Practices.....	71
(e) Self-Study	71
V. COUNCIL ACCREDITATION HANDBOOK.....	72
APPENDIX A: ESSENTIALS AND CRITERIA	A-1
Description of a Montessori Teacher	A-2

I. Sponsorship.....	A-2
II. Resources.....	A-3
III. Curriculum	A-4
IV. Students.....	A-5
V. Operating Policies	A-6
VI. Program Evaluation	A-7

ESSENTIALS AND CRITERIA FOR THE GENERIC REVIEW COMMITTEE.....	A-8
--	------------

APPENDIX B: ARTICLES OF ASSOCIATION B-1

Article I. Name	B-1
Article II. Purpose	B-1
Article III. Membership	B-1
Article IV. Board of Directors	B-3
Article V. Accreditation Function	B-11
Article VI. Standard of Care and Indemnification.....	B-14
Article VII. Council Records and Reports.....	B-15
Article VIII. Controversies and Disputes	B-16
Article IX. Dissolution and Termination	B-20
Article X. Amendments	B-21
DECLARATION AND CERTIFICATION OF ADOPTION.....	B-21
RESOLUTION OF ADOPTION BY COLLABORATING ORGANIZATIONS.....	B-21
RESOLUTION OF ADOPTION BY UNAFFILIATED SPONSORING INSTITUTIONS	B-23

GENERAL OVERVIEW OF ACCREDITATION

The agency **International Montessori Accreditation Council** (referred to as "Council") is a private agency for the voluntary, non-governmental accreditation of educational programs for the preparation of Montessori teachers. Such accreditation is intended to be provided within an umbrella structure of collaboration among various associated organizations, committees and other bodies which cooperate together according to specified accreditation standards, procedures and practices.

The Council's purpose is generally to improve the quality of Montessori teacher education programs by: (1) creating goals and standards for program improvement; (2) providing recognition for programs which meet specified standards; (3) assisting prospective students, employers and other interested persons in the identification of acceptable educational programs; (4) providing a more unified and dignified presentation of Montessori education to the world; and (5) offering a basis for the fair and impartial determination of eligibility for government financial assistance to accredited programs.

Programs seeking accreditation must comply with specified Council standards, *Essentials and Criteria*, which provide the basis for all Council review and recognition procedures and practices. Such standards are employed by the Council in its accreditation procedures which require the program to undergo a formal self-study, on-site visit and other such review and evaluation activities to measure the extent of the program's compliance with the pertinent *Essentials and Criteria*. Based on the program's compliance with the *Essentials and Criteria* through such procedures, the program is eventually granted formal "accredited" status with the Council.

This IMAC *Statement of Basic Accreditation Procedures* sets forth the function of Council operation in the accreditation process. Accreditation documents, policies and practices contained in this Statement have been adapted from those employed by the *Committee on Allied Health Education and Accreditation (CAHEA)*. The Council acknowledges with grateful appreciation the important contribution of CAHEA in this respect. Operation of Council accreditation is conducted in harmony with the two other basic Council documents: (1) Essentials and Criteria, the Council's accreditation standards and (2) Articles of Association, The Council's legal governing instrument.

DEFINITION OF TERMS

Accreditation Standards: The *Essentials*, *Criteria*, and *Guidelines* which constitute the basis for evaluation and review of programs accredited by the Council.

Advisory Committee: The final decision-making authority of the agency International Montessori Accreditation Council with respect to accreditation activities of the Council.

Affiliate: A facility independent of the sponsoring institution which cooperates in providing certain learning experiences for the student within the structure and process of program operation.

Annual Report Form: An annual survey form sent by the Council to directors of accredited programs. Completing, signing and returning the Annual Report is required for all such programs.

Board of Directors: The Council body which manages and directs the general business, policy-making and other affairs of the Council. Members of the Board of Directors are designated by collaborating organizations and program delegates.

Certificate: Documentation that an individual has completed a program of prescribed study according to pertinent requirements and is qualified to be so cited.

Collaborating Organization: A qualified national or international Montessori organization which cooperates in the Council accreditation procedures. Functions include representation on the Board of Directors, sponsorship of review committees, and adoption of specific accreditation standards. (refer to *Establishing a Collaborating Organization*, I. (C)(3)

Conflict of Interest: An incompatibility between the personal interests and the official responsibilities of a person, or between the competing interests of a person holding responsible positions with more than one entity. Persons who find themselves in such a position must identify and excuse themselves from engaging in decisions regarding those activities where a conflict is or may be present.

Consensus: Unified general agreement or accord (i.e., without a substantial opposing minority opinion) as to all significant aspects of some issue. All Council components are strongly encouraged to achieve consensus in their deliberations.

Criteria: Accreditation standards which specifically define, complement and clarify the **Essentials** as applied to programs which are reviewed, surveyed or evaluated by a specific review committee.

Curriculum: A grouping of instructional experiences and specified study directed to the preparation of an individual for Montessori teaching.

Essentials: The minimum standards, by which all programs are reviewed, surveyed or evaluated for purposes of accreditation.

Generic Review Committee: The review committee established directly by the Council to provide review and evaluation of programs unaffiliated with any collaborating organization.

Guidelines: Explanatory statements, examples or illustrations which clarify how the *Essentials and Criteria* are interpreted.

International Montessori Accreditation Council (the "Council"): An umbrella accrediting agency which works cooperatively with externally sponsored review committees and a Generic Review Committee to accredit educational programs for the preparation of Montessori teachers.

Postsecondary Education: Instruction and learning experiences directed primarily to persons who have completed or terminated their secondary education or who are beyond the age of compulsory high school attendance.

Probationary Accreditation: The category of accreditation used by the Council and its related review committees 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. Probationary Accreditation may be limited to one year. It may not extend beyond two years. The period of Probationary Accreditation may be as short as thirty days. During a period of Probationary Accreditation, programs are recognized and listed as being accredited.

Probationary Accreditation - Administrative: The category of accreditation that may be granted when the program does not comply with one or more of the administrative requirements for maintaining accreditation, which include: (1) Submitting an acceptable Self-Study Report or a required progress report within a reasonable period of time, as determined by the review committee. (2) Agreeing to a reasonable site visit date before the end of the period for which accreditation is awarded. (3) Informing the review committee within a reasonable period of time of changes in key program personnel, as required by the *Essentials and Criteria*. (4) Paying accreditation fees and charges within a reasonable period of time. (5) Completing and returning by the established deadline the Annual Report provided by the Council, and a similar annual report, if required, by the review committee.

Program: An educational structure designed to provide students with the basis for knowledge and skills to function in the capacity of a Montessori teacher. It includes the curriculum as well as the administrative support required to implement the specified structure and sequence of educational and skill development experiences.

Program Delegates: Individual representatives of the Council-accredited programs who function together as a Council body to perform certain decision-making and consultative activities.

Program Director: The person in charge of developing and maintaining an educational program within a sponsoring institution.

Provisional Accreditation: The category of accreditation assigned to a new program that seeks accreditation 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, is likely to 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 is near graduation or has graduated.

Recommended Format: A model format and basic phrasing for such accreditation components as Self-Study Report and Site Visit Report which provides clarity and logical sequencing to review committees in their development and use of the actual documents.

Review Committee: The term which identifies those committees that cooperate with the Council to review and evaluate programs in the accreditation process. Review committees are appointed and sponsored by their respective collaborating organizations. The review committee functions include: to make arrangements for a site visit, select the site visit team, evaluate the team's report of the site visit, and to forward a recommended accreditation status to the Council's Accreditation Committee.

Self-Study Report: A documented written account of the program's own evaluation of program outcomes and operation necessary to indicate substantial compliance with the *Essentials and Criteria*.

Site Visit Report: A confidential written report prepared by the site visit team and signed by the team members, which may or may not include recommendations regarding accreditation. The report is forwarded to the review committee for evaluation. A copy is provided to the sponsoring institution and program for comment and for correction of any inaccuracies in its factual content.

Sponsoring Institution: An institution having primary responsibility for designing, conducting and evaluating a Montessori teacher education program.

I. OPERATING PROVISIONS

A. GENERAL POLICY STATEMENTS

As basic policies in all phases of its operation, the Council:

- ❖ Functions as an autonomous agency in all programmatic accreditation decisions.
- ❖ Conducts a voluntary accreditation review process only upon written request from the chief executive officer of the sponsoring institution of a program seeking Council accreditation.
- ❖ Complements the goals and activities of other accrediting bodies.
- ❖ Supports cooperative activity between the collaborating organizations and programs participating in the accreditation process.
- ❖ Assists in organizing review committees and in establishing review processes.
- ❖ Cooperates with review committees and their collaborating organizations in establishing, maintaining, periodically reassessing and, as necessary, revising policies, procedures, and minimum standards for accrediting Montessori teacher education programs.
- ❖ Provides recognition for educational programs which meet established standards, including publishing lists of those that are currently accredited and of those that are no longer accredited.
- ❖ Makes available to the public reports of its operations and its standards for accreditation.
- ❖ Observes principles of due process in the accreditation of educational programs.
- ❖ Avoids conflict of interest or the appearance of conflict of interest.
- ❖ Maintains the confidentiality of information collected during the accreditation review process.
- ❖ Encourages consensus and accord in all its decision-making procedures.
- ❖ Seeks and maintains recognition as an accrediting agency from applicable bodies where appropriate, e.g., the *Council on Post secondary Accreditation* (COPA) and the *U.S. Department of Education* (USDE).

B. SUMMARY OF COUNCIL ORGANIZATION

1. General

The Council conducts its accreditation in collaboration with various interrelated organizations and committees. A Council Accreditation Handbook with application form and general information is sent to those making inquiries with the Council. The applicant for accreditation must then respond by formally applying to the Council for this purpose, at which time the accreditation process is initiated. Thereafter, the program's application is referred to the pertinent review committee to proceed with a formal self-study and other such evaluation procedures. The review committee provides the applicant with its own written standards and procedures; e.g. *General Orientation Guide*, and communicates directly with the program throughout the accreditation process of self-study and on-site evaluation visit. Thereafter the review committee ultimately recommends action for accreditation to the Council, whose Advisory Committee considers the matter for final decision. Each of the elements of the Council is briefly summarized below with reference to the organizational chart on page 4.

2. The Council:

The Council consists of: (a) Advisory Committee; (b) Board of Directors; and (c) Program Delegates. The Council as a whole serves as the essential umbrella agency to coordinate and manage all accreditation policies and procedures.

(a) **Advisory Committee:** The Advisory Committee is the final authority with respect to accreditation actions of the Council. This committee consists of public members from outside the field of Montessori education who are selected by the Board of Directors. The Advisory Committee functions as an autonomous Council body to finally review both the recommendations of the review committees and the process by which they were reached.

i. Policy Statements:

- ❖ Serves as the final decision-making authority of the Council with respect to accreditation activities.
- ❖ Functions as an autonomous Council body to finally review both the recommendations of the review committees and the process by which they were reached.
- ❖ Examines recommendations of the review committees for consistency and clarity in relation to the applicable *Essentials and Criteria*.
- ❖ Provides assurance that established Council and Advisory Committee policies and practices have been followed and that due process has been observed in arriving at accreditation recommendations.
- ❖ Maintains continuing oversight of its accreditation decisions through such means as consideration of information on annual reports, findings, recommendations, and other information forwarded to it by the Council or otherwise properly obtained by the Advisory Committee.
- ❖ May examine suggestions or recommendations for program improvement made by the review committees that may be perceived as inappropriate intrusions into the administrative prerogatives of a program and its sponsoring institution.
- ❖ Avoids duplication of the work and function of the review committees in making an independent assessment of each program's relative compliance with the *Essentials and Criteria*.
- ❖ Acts on recommendations to either accept, modify or refer them back to the review committee with instructions for further consideration.

ii. Accepting the Recommendation of the Review Committee

The Advisory Committee may "accept" the recommendation of the review committee. Such "acceptance" may include suggestions and recommendations for the review committee to consider in the review committee's continuing responsibility for oversight review of the program and cooperation with the overall Council accreditation activity.

iii. Modifying the Recommendation of the Review Committee

The Advisory Committee may "modify" the recommendation of the review committee when it finds that the review committee has violated applicable due process procedures, *Essentials and Criteria* or has otherwise inappropriately intruded into the administrative prerogatives of a program and its sponsoring institution. Within the

bounds of the pertinent *Essentials and Criteria*, the Advisory Committee may "modify" the recommendation within the specified accreditation category to extend the length of accreditation or to otherwise reduce the program's procedural burden to verify compliance. The Advisory Committee may not otherwise "modify" a review committee recommendation; e.g., to reduce the specified length of accreditation, to change the accreditation category or to add its own further conditions or qualifications to the stated recommendation.

iv. Referring Back the Recommendation of the Review Committee

If the Advisory Committee finds itself unable to accept or modify the review committee's recommendation as indicated before, Council accreditation action is deferred and the recommendation is referred back to the review committee with pertinent instructions and reasons for further consideration. The Advisory Committee may also refer back a recommendation to assure that (1) there is consistency and clarity in relation to the applicable *Essentials and Criteria*, (2) established Council and Advisory Committee policies and practices have been followed and (3) due process has been observed in arriving at accreditation recommendations. During the pendency of such further review committee consideration, the last prior pertinent accreditation action of the Advisory Committee shall remain in force. Otherwise, the status quo before the deferred action shall be maintained; provided, however, that the Advisory Committee may render an interim decision for accreditation to avoid undue jeopardy or prejudice to the affected program.

v. Resolving Conflicts and Disputes with Review Committee

In referring back a review committee recommendation, the Advisory Committee may include in its instructions certain time limits and other procedural conditions for submittal of a revised recommendation. The review committee's timely submittal of such a revised recommendation shall be considered anew by the Advisory Committee to either accept, modify or refer it back again in accordance with the policies and procedures set forth here before. If the Advisory Committee does not receive such revised recommendation within the time period specified, it may act on its own to finally decide the matter of accreditation in accordance with all pertinent Council standards, policies and procedures.

vi. Continuing Oversight

The Advisory Committee maintains oversight responsibility for its accreditation decisions through review of information it receives from review committees and other proper sources. The Advisory Committee may act for this purpose to specifically request, order, instruct or otherwise direct review committees to comply within the bounds of their proper function — to conduct and report back on reviews of specific programs, issue recommendations and/or otherwise act on behalf of the Advisory Committee in a timely and diligent manner. If such action is not forthcoming after due notice, the Advisory Committee may proceed to act on its own by any proper means to assure the integrity of its accreditation decisions and its ultimate decision-making responsibility. (I (B)2(a)(iii), p.13)

- (b) Board of Directors:** The Board of Directors has full authority to manage and direct the general business and affairs of the council consistent with and under the provisions and qualifications stated in the Articles of Association (Refer to Appendix B). The Board of Directors consists of individual representatives designated by each of the col-

laborating organizations and specified voting representation from the body of Program Delegates. Significant duties of the Board Directors include:

- ❖ Assess and Collect Council fees;
- ❖ Approve and publish council information;
- ❖ Delegate authority by appointment of committees and designation of officers;
- ❖ Interpret, enforce and implement the Articles of Association;
- ❖ Select members of Advisory Committee;
- ❖ Review Council policies and procedures to improve the operation and efficiency of accreditation activity.

(c) Program Delegates: The body of Program Delegates consist of individual representatives of all those sponsoring institutions which conduct programs holding current accredited status with the Council, Such representatives are entitled to one vote each on all matters which properly come before the Program Delegates.

3. Collaboration Organizations:

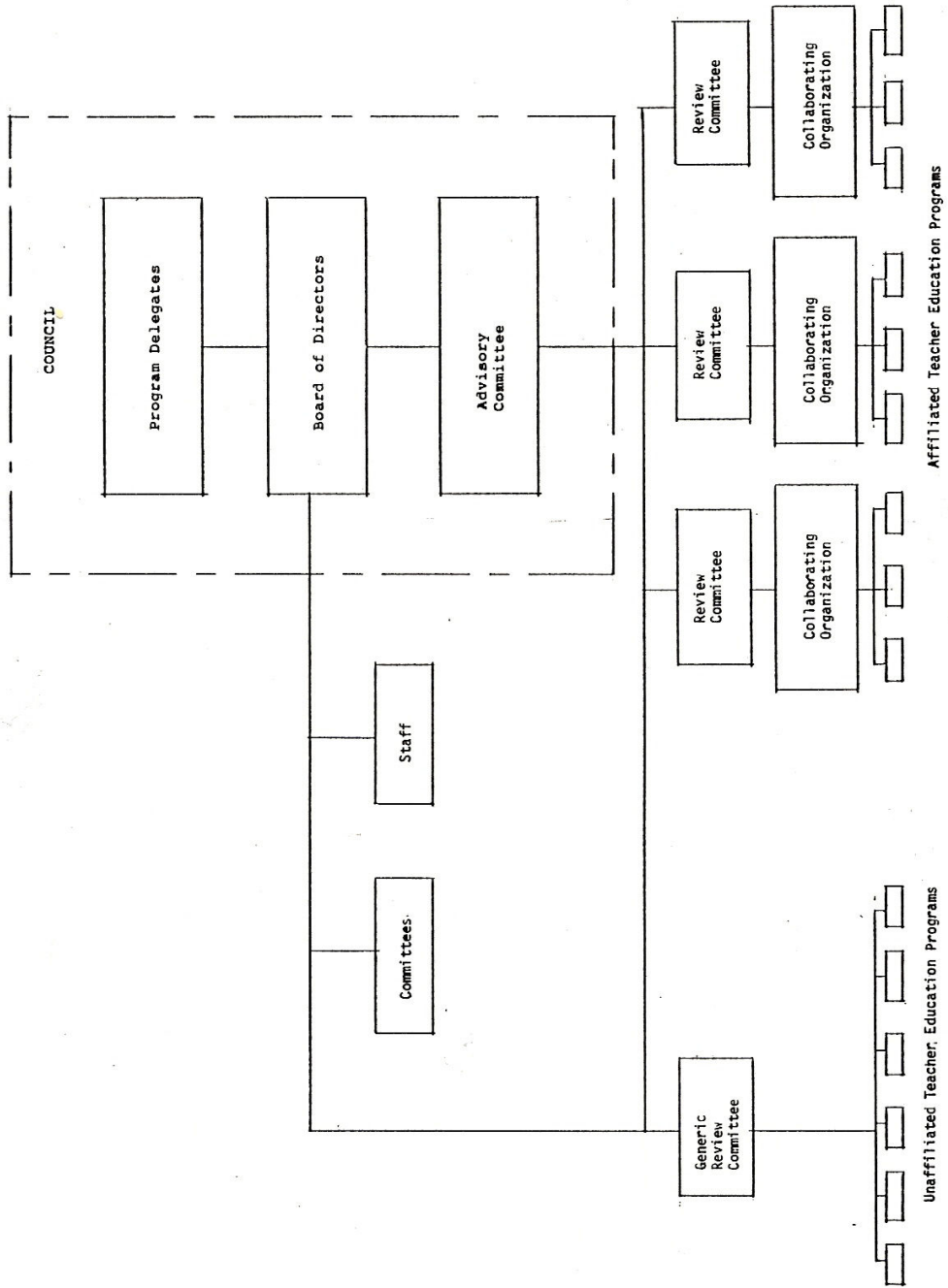
Collaborating organizations are qualified national or International Montessori organizations, which participate in Council accreditation procedures through their appointed review committees. [Refer to *Establishing a Collaborating Organization I. (C) (3)*]. Specific duties of a collaborating organization include:

- ❖ Designates its representative to serve on the Council Board of Directors;
- ❖ Appoints qualified personnel to its review committee and assures regularly scheduled meetings;
- ❖ Adopts accreditation standards, Essentials and specific Criteria to evaluate its affiliated Montessori Teacher education programs.

4. Review Committees:

Review committees are vested with the responsibility and authority to evaluate programs after the sponsoring institution has requested accreditation review. Their principal means of program evaluation consists of analyzing Self-study Reports, sending well-qualified representative teams to conduct site visits, and considering all relevant materials to develop an accreditation recommendation for the Council's Advisory Committee. Members of review committees are appointed by their respective collaborating organization. A *Generic Review Committee* is established by the Council's Board of Directors to evaluate programs independent and unaffiliated with respect to any collaborating organization.

Organizational Chart of Council



C. COLLABORATIVE RELATIONSHIP

1. Policy Statements

The Council:

- ❖ Encourages cooperative activity with and among the collaborating Montessori organizations which (1) participate in developing and revising the *Essentials* and specific *Criteria*; (2) designate a representative to serve on the Council Board of Directors; (3) appoint members of their review committee; (4) provide resources needed for their review committee operation; (5) recommend qualified personnel to serve as site visitors; and (6) keep informed of review committee activities.
- ❖ Encourages collaborating organizations to make a commitment to long-term sponsorship and support of their review committees, normally for as long as the review committee continues to fulfill its evaluation and recommendation roles.
- ❖ Encourages representatives of collaborating organizations to keep their constituents informed about the activity of their respective review committees and of the Council.

Each collaborating organization adopts the *Essentials* and specific *Criteria* and appoints qualified personnel to its review committee which are recognized by the Council for their respective purposes and functions. This review committee and the Council's Advisory Committee then use the adopted *Essentials* and specific *Criteria* to ascertain the relative compliance of the affiliated programs seeking accreditation.

2. Nature of the Collaborative Relationship

Recommendation from the review committees of their respective collaborating organizations are acted upon by the Council, which serves as an umbrella agency with responsibility for coordinating accreditation activities for all Montessori organizations, institutions and programs which have voluntarily sought Council accreditation. The Council provides staff liaison to each of the review committees as needed to keep informed and to assure compliance with all Council policies and procedures.

3. Establishing a Collaborating Organization

An organization wishing to participate with the Council as a collaborating organization submits an official written request, after which the Council's Board of Directors votes on whether or not to establish a collaborative relationship. The strength of the commitment of the organization to support the effective operation of its review committee and otherwise to assure successful compliance with its pertinent responsibilities with the Council are determining factors. In addition, collaborating organizations must qualify as being national or international in their scope of operation, offering standardized Montessori teacher education program content and format for the purposes of affiliation with separate legal entities to conduct all or any substantial portion of its teacher education activity.

Montessori organizations wishing to establish an accreditation review process within the Council structure are assisted by the Council staff in achieving collaborative status; in drafting specific *Criteria*; in developing accreditation procedures and informational material under a review committee; and in facilitating adoption and recognition of the *Criteria* by the collaborating organization and the Council.

All organizations seeking to collaborate with the Council in accrediting its affiliated Montessori teacher education programs must officially petition the Council for recognition as a collaborating organization. The petition must show evidence of:

- ❖ Compliance with basic qualifications as to appropriate scope and status;
- ❖ Adoption of Council *Essentials* and *their* own specific *Criteria* relative to Montessori teacher education;
- ❖ Ratification of the Council's documents entitled Statement of Basic Accreditation Principles and Articles of Association;
- ❖ Financial commitment for support of the accreditation activities of the review committee established by the collaborating organization, and for support of other Council responsibilities.

Each collaborating organization is invited to appoint a representative to the Council's Board of Directors and to designate its review committee for purposes of operation of accreditation activity.

4. Discontinuing a Collaborative Relationship

(a) **Voluntary Discontinuation of a Collaborating Organization:** The collaborative relationship between a particular collaborating organization and the Council is entered into at the specific request of the organization. Collaborating organizations are advised to view their commitment as long term, normally for as long as the review committee continues to fulfill its evaluation and recommendation roles.

Before deciding to withdraw from accreditation activities, collaborating organizations are advised to carefully consider the following:

- i. The decision to collaborate in the accreditation of Montessori teacher education programs is a careful choice made by a responsible national or international professional organization; the decision to withdraw from accreditation activities must be responsible and advisably reached under conditions which ensure that the principles of due process have been followed. The collaborating organization will protect its own reputation by protecting the affiliated programs it represents from giving the appearance of being arbitrary or inconsistent.
- ii. If a collaborating organization is considering withdrawing from the Council, it would advisably involve its review committee in arriving at that decision. So that commitments made by the collaborating organization and the review committee to sponsoring institutions with accredited programs may be met, the withdrawing collaborating organization is advised to notify its affiliated programs, the review committee, and the Council at least six months in advance of the date of intended discontinuation of participation. All financial obligations to the review committee should be paid in full.

(b) **Involuntary Discontinuation:** If a collaborating organization is considered as failing to meet the appropriate responsibilities, the collaborative relationship with the Council may be considered for initiating discontinuation. [Refer to Appendix B, b-20, Articles of Association, Article VIII, Section 3]

In such cases, the complaining party formally requests of the Council the involuntary separation of the collaborating organization. This request is made to the Council in writing with reasons stated for such action. The pertinent collaborating organization is given a copy of such request and a reasonable opportunity for reply. Thereafter the Council investigates and decides the matter of involuntary discontinuation in accordance with due process procedures and fundamental fairness to all parties concerned.

D. REVIEW COMMITTEE STRUCTURE, FUNCTIONS AND RESPONSIBILITIES

1. Policy Statements

The Council:

- ❖ Assists appropriate organizations in attaining collaborative status, in determining review committee representation, and in developing operational procedures related to review committee structure and functions.
- ❖ Cooperates with review committees and their associated collaborating organizations (1) in establishing, maintaining and periodically reassessing and, as necessary, revising policies, procedures and minimum standards for accreditation of Montessori teacher education programs and (2) in maintaining appropriate records relating to the accreditation review process.
- ❖ Monitors the policies and practices of review committees to assure reasonable compliance with the Council policies and procedures and to assure accuracy, consistency and completeness of accreditation records.
- ❖ Takes an accreditation action only upon the recommendation from a review committee while retaining the option of returning the recommendation for further consideration.

2. Review Committees and the Collaborative Relationship

Collaborating organizations have a responsibility of forming a review committee to evaluate the relative compliance of programs with the *Essentials and Criteria* and to make accreditation recommendations to the Council.

Council staff provide new collaborating organizations with appropriate information to guide the formation and effective operation of their review committees. Such information includes a thorough review of all Council policies and procedures, especially those covering such areas as fees for accreditation services, classification of accreditation actions, and site visit procedures. New review committees may also be provided with a copy of any pertinent Criteria or other information of the U.S. Department of Education (ED) and of the Council on Post-secondary Accreditation (COPA).

3. Review Committee Structure

- (a) **General:** Collaborating organizations appoint qualified persons to serve as their review committees. Such persons are selected with due regard for competence with respect to level(s) and type(s) of Montessori teacher education for which they assume evaluative responsibility. Review committees may have public representatives, either as consultants or as members.

The review committee may make provisions for a rotating membership to assure continuity. This can be accomplished by staggering the initial appointments to the committee for one, two, or three years. Committee officers may be elected for fixed terms by members of the committee. Meetings are advisedly conducted according to customary parliamentary procedures.

- (b) **Generic Review Committee:** A Generic Review Committee shall be established by the Council Board of Directors to evaluate programs seeking accreditation status outside of affiliation with existing collaborating organizations. There should be no more than one representative or equal representation (whichever is less but not zero) from each collaborating organization appointed by the Council Board of Directors to serve on this committee. Continuity and the expertise and resources to provide timely and effective communication must be considered in determining appointments to the committee and the location of review committee staff activities and meeting.

Unaffiliated accredited programs shall 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 opposition of any unaffiliated accredited program; provided that such opposition is accompanied by a qualified alternative [Refer to Appendix B, b-15, Articles of Association, Article V, Section 3).

Procedures and policies of the Generic Review Committee should conform as much as possible with that of other review committees. The Generic Review Committee evaluates the relative compliance of programs with the *Essentials* and specified *Criteria* and *Guidelines* which are recognized for this purpose by the Council.

- (c) **Staff Support:** The Council provides staff assistance during the organizational period of a review committee; it does not, except in the most unusual circumstances or in the operation of the Generic Review Committee, continue to provide staff support after the committee is established.

The collaborating organization for each review committee must devise a plan to carry out review committee operations - such as corresponding with programs, scheduling and arranging visits, preparing for review committee meetings, and transmitting the committee's accreditation recommendations to the Council - in a timely and efficient manner. The Generic Review Committee, in consultation with Council staff, determines its own plan and scheduling in a manner similar to that of other review committees.

4. Review Committee Functions

Review committees are vested with the responsibility and authority to evaluate programs after the sponsoring institution has requested accreditation review. The major functions of the review committee are related to the basic responsibilities of:

- ❖ Cooperating with the Council in establishing, maintaining, periodically reassessing and, as necessary, revising policies, procedures, and minimum standards for accrediting Montessori teacher education programs within its scope of responsibility;
- ❖ Conducting the accreditation review process in accordance with these policies, procedures, and standards; and
- ❖ Maintaining appropriate records of its activities related to the accreditation review process.

Specific functions include:

- (a) **Determining the appropriateness of a site visit:** Based upon the application for program accreditation submitted to the Council and, where necessary or appropriate, relevant supplementary materials, the pertinent review committee makes an initial determination of the program's readiness to conduct a self-study. If the determination is affirmative, the review committee guides the program in preparing a satisfactory Self-Study Report, after which it establishes the date(s) for the site visit. The review committee is responsible for periodically informing the Council of site visit dates so that applicant programs may be tracked as they proceed through the accreditation review process.
- (b) **Conducting the accreditation review:** The review committee is responsible for:
 - ❖ Analyzing the Self-Study Report;
 - ❖ Identifying and/or preparing competent site visitors who are acceptable to the sponsoring institution of the program under review. [Refer to II. (F), General Orientation Guide, Characteristics of Successful Site Visitors]
 - ❖ Providing site visitors with the necessary materials prior to the survey;
 - ❖ Offering programs an opportunity for reconsideration of recommendations of accreditation withheld, accreditation withdrawn, and probationary accreditation;
 - ❖ Ensuring that the sponsoring institution receives a written copy of the report of the site visit team within a reasonable period of time following the visit so that the institution has an opportunity to comment on the report and to correct factual errors; and
 - ❖ Providing the Council with a recommended accreditation action, accompanied by specified information, including a copy of the report of the site visit team.

5. Interactions Between Review Committees and the Council

- (a) **Attending Meetings:** The primary interaction among members of the Council and review committees takes place during meetings of review committees, and of the Council committees and staff activities. Council staff, representing the Council, may attend meetings of review committees for discussion of appropriate agenda items. Review

committee chairpersons and their staff are informed of Council meetings at least annually and are invited to attend to discuss policies and procedures related to the cooperative accreditation effort and to explore larger issues affecting Montessori education. Review committee representatives may be present during Council consideration of review committee accreditation recommendations and may respond to requests for clarification.

(b) Quality Assurance Program: Participants in the Council accreditation review process also interact through implementation of the Quality Assurance Program. In order to fulfill its public responsibilities and to retain any pertinent recognition as an umbrella accrediting agency, the Council reviews the policies and procedures and monitors the review processes of the review committees. Reviewing and monitoring activities may include:

- i.** Reviewing written review committee policies to ascertain consistency with those of the Council, and to ensure due process.
- ii.** Monitoring review committee processes through staff attendance at review committee meetings.
- iii.** Providing information and assistance for program site visitors.
- iv.** Gathering data through the Program Site Visit Questionnaire (PSQ), the Annual Report, and other mechanisms to seek ways to improve the review process.

(c) Maintaining Records: Review committees and Council staff interact extensively in maintaining appropriate records of the accreditation review process. Review committees maintain a file of pertinent correspondence with the program and with the Council. The Council maintains the permanent official record of accreditation actions, including the completed application forms for initial and continuing accreditation, the Council's notification of accreditation letter, letters resolving complaints, information on changes in sponsoring institutions, requests that accreditation be withdrawn, and notifications of programs' discontinuation.

(d) Communicating with Programs: Review committees and the Council staff interact during major communications with programs.

- i. Responding to Applications for Council Accreditation:** To ensure a focus for accreditation activities for all Montessori teacher education programs, the application for accreditation provided by the Council must be signed by the chief executive officer of the applicant sponsoring institution and submitted to the Council. The Council records and acknowledges receipt of each application and notifies the pertinent review committee.
- ii. Notifying sponsoring institutions of the Council's accreditation decision:** The Council sends official notification of the accreditation action to the chief executive officer of the sponsoring institution, with copies to the appropriate institutional and program officials and to the pertinent review committee.

E. CLASSIFICATION OF ACCREDITATION ACTIONS

1. 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.

2. Underlying Provisions

Review committees use the following categories when determining accreditation recommendations to be forwarded to the Council. These recommendations are based on review committee evaluation of the extent to which a program complies with the *Essentials* and pertinent *Criteria*. Review committees do not need to use all of the categories of accreditation, but they may not add any without the approval of the Council.

Review committees determine 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 review committee on the findings and conclusions of the visiting team. The Site Visit Report remains the property of the sponsoring institution.

- (a) **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.

- (b) **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.

- (c) **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 are believed to be readily correctable, review committees may recommend either (1) the five-year maximum duration of accreditation or (2) a reduced duration of accreditation.

- i. When a review committee recommends the maximum five-year duration, it requires evidence-documenting correction of deficiencies by a specific date. The Council's notification letter contains a clear statement of each deficiency and a due date for a progress report or plan of correction.

Upon review 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.

- ii. 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 review 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.

- (d) **Accreditation with Qualification:** Review committees 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's accreditation letter contains a clear statement of each deficiency and of the review committee requirement for one or more progress reports.

Upon review 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.

- (e) **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 state-

ment 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.

Review committees provide an opportunity for reconsideration prior to Council action. [Refer to IV.(C)(3), *Review Committee Reconsideration of Recommendations of Probationary Accreditation*] Council awards of **Probationary Accreditation** following review committee 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's 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 would be well advised that the program is on probation.

(f) **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:

- i. Submitting the Self-Study Report or a required progress report within a reasonable period of time, as determined by the review committee.
- ii. Agreeing to a reasonable site visit date before the end of the period for which accreditation is awarded.
- iii. Informing the review committee within a reasonable period of time of changes in program personnel, as required by the *Essentials and Criteria*.
- iv. Paying Council or review committee accreditation fees and charges within a reasonable period of time, as determined by the Council or review committee.
- v. 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 review committee that this action is being considered.

Prior to the Council placing a program on **Probationary Accreditation -- Administrative** for other reasons, the review committee 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. Review committees are 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.

3. Denying Accreditation

- (a) **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, review committees provide an opportunity for reconsideration of their recommendation to withhold accreditation. [Refer to IV.(C)(2), *Review Committee Reconsideration...*] The review committee letter informing the appropriate official of the accreditation recommendation describes the reconsideration process. This process may vary among review committees, but in all cases it is designed to expedite requests for reconsideration.

The Council's letter notifying the appropriate program 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.

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

Accreditation may be involuntarily 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. [Refer to II.(E)(4), *Moving from One Accreditation Category to Another*, this page)

The appropriate program 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.

iii. Opportunity for Review Committee Reconsideration and/or Appeal to the Council: Prior to Council action, review committees provide an opportunity for reconsideration of a recommendation to withdraw accreditation. [Refer to IV.(C)(2), *Review Committee Reconsideration...*,]

The review committee letter informing the appropriate official of the accreditation recommendation describes the reconsideration process. This process may vary among review committees, but in all cases, it is designed to expedite requests for reconsideration.

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

4. Moving from One Accreditation Category to Another

- (a) **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**.*
- (b) **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**.*
- (c) **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**.*

- (d) **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**.*
- (e) **Use of Probationary Accreditation:** The accreditation review process usually provides a period of **Probationary Accreditation** to allow programs that are not in substantial compliance with the *Essentials and 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 a 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 IV.(C), *Review Committee Reconsideration...* and in IV.(D), *Council Appeals Procedures for Accreditation Withheld or Withdrawn*]

II. EVALUATION PRACTICES AND PROCEDURES

A. PROGRAMMATIC SELF-STUDY

1. Policy Statements

The Council:

- ❖ Recognizes the sponsoring institution's right to define its own means of conducting on-going self-evaluation.
- ❖ Requires that the Council's accreditation review process, including programmatic self-study and site visit, take into consideration the operational goals of the sponsoring institution and of the program.
- ❖ Requires as an integral part of its accrediting process a program self-study presented in a Self-Study Report, followed by a site visit of the program, in order to assess the applicant program's relative compliance with the *Essentials and Criteria*.
- ❖ Requires that the self-study process, as required by the *Essentials and Criteria*, include an analysis of strengths, weaknesses, and plans for improvement, which must appear in the Self-Study Report.
- ❖ Encourages review committees to adopt a consistent means of analyzing Self-Study Reports to determine the program's readiness for a site visit.
- ❖ Encourages review committees to inform their associated programs of the desirability of widespread involvement in ongoing program evaluation, in conducting the self-study, and in preparing the Self-Study Report.

- ❖ Requires that the Self-Study Report be prepared in a format mutually acceptable to the accreditors and to the accredited.
- ❖ Encourages programs to develop a self-study process that reflects a balance between outcomes and process and that produces an appropriately brief and cost-effective Self-Study Report, as suggested in the Recommended Format for the Self-Study Report.

2. The Focus of Programmatic Self-Study

Self-study, a self-help activity done for the benefit of the program, its sponsoring institution, the students, and the faculty, is a means to an end, not an end in itself. An ongoing process which focuses on qualitative and analytic values, in addition to quantitative dimensions, self-study entails a comprehensive review and assessment of the purpose, goals, objectives, and operation of the program as a whole and of its component parts. It applies to a critical assessment of curriculum content and design, teaching assignments, teaching methods used for given components of instruction, the policies and procedures which relate to faculty, student, applicant and graduate evaluation, and numerous other dimensions which affect its quality.

3. Variables Affecting Self-Study

Education for Montessori teacher preparation manifests itself in diversity. That diversity is found in institutional sponsorship, organization, size of the program, and other such factors. These variables illustrate the merits of accommodating a diversity of approaches to programmatic self-study.

4. Variety of Modes Permissible in Self-Study

Self-study may occur in a variety of modes. Effective and efficient self-study is evidenced by the thoughts and constructive critique and changes within a program and by the individuals who are affected by it; it is not based upon exhaustive documentation.

5. Prerogatives of the Sponsoring Institution and its Programs

A program and its sponsoring institution may determine the scope and process of their self-study, in keeping with the relative complexity of the program and its sponsorship. They may also determine the resources and time that are to be devoted to the effort. In the exercise of these prerogatives, the participants in the self-study are likely to be more open and creative within the process than they would be were the scope and process rigidly defined by the accrediting agency. These prerogatives allow for a unified and uniform approach for self-study for those institutions which may conduct a variety of programs.

Review committee guidance on conducting the self-study and preparing the Self-Study Report may not place faculty and staff in a position of compromising other responsibilities, such as supervision of students or faculty, or the developmental work that is needed to improve the program.

6. Participants in the Self-Study Process

The portion of ongoing self-evaluation that leads to the development of the Self-Study Report is usually conducted over a number of months under the coordination of the program director. Contributors may include program officials and faculty; administration officials and resource persons; supervisory staff at affiliated institutions; non-program faculty; program advisors (e.g., advisory committee members); students and graduates; and other appropriate individuals.

7. Documentation of Self-Study in the Self-Study Report

Documentation of the fulfillment of the self-study requirements for accreditation is satisfied by a Self-Study Report [Refer to II.(B), *Recommended Format for the Self-Study Report and its Evaluation*] including a self-analysis of the program strengths, weaknesses, and plans for improvement.

8. Content and Sequence of the Self-Study Report

Review committees provide guidance on how to conduct a self-study and on how to prepare the Self-Study Report. This assistance may include an outline of the Self-Study Report; some review committees may also offer instruction in the self-study process through periodic workshops. The narrative and documentation of the Self-Study Report will most suitably follow the sequence of the applicable *Essentials and Criteria*. The documentation substantiating the narrative is intended as representative rather than comprehensive and should not exceed what is required to demonstrate compliance with the *Essentials and Criteria*. Supplementary exhibits dealing with major divisions of the *Essentials and Criteria* may be integrated with the narrative, or appear in appendices, or both. The narrative and documentation should culminate in a qualitative analysis of the program's strengths and weaknesses and with a statement of actions planned to correct the latter.

9. Presentation and Use of the Self-Study Report

The Self-Study Report is used in the accreditation process by members of review committees, designated readers, accreditation staff, and site visitors. It should contain only pertinent and necessary materials, all of which are legible, and should be bound or presented so that it may be conveniently reviewed. Keeping cost in mind, the review committees are advised to request the minimum number of copies necessary and to encourage brevity.

B. RECOMMENDED FORMAT FOR THE SELF-STUDY REPORT AND ITS EVALUATION

1. Policy Statements

The Council:

- ❖ Provides the Recommended Format of the Self-Study Report and its evaluation to encourage consistency in the scope, format, style and evaluation of the Self-Study Report in fulfilling the objective of demonstrating compliance with the *Essentials and Criteria*.
- ❖ Facilitates cost-containment through a model of succinct self-study reporting.
- ❖ Reduces the work load of reviewing the Self-Study Reports.

2. Procedure

Since the Recommended Format for the Self-Study Report was designed to follow the *Essentials*, review committees will modify the content and/or sequence to accommodate its own particular *Criteria* and *Guidelines* (if any) which necessarily guide the preparation of the Self-Study Report.

Review committees individually determine which exhibits must accompany the Self-Study Report and which may be retained on site for review by a visiting team. Column three in the Recommended Format merely suggests desirable exhibits. Review committees evaluate the information given in the *Essentials and Criteria* to determine suitability for further pro-

ceedings in the accreditation review process, such as scheduling of an on-site evaluation visit. The "Evaluation of Potential Compliance" [Refer to II.(B)(4)] is the recommended format used by review committees to record notes during review of the Self-Study Report (e.g. strengths, weaknesses, suggestions for improvement of potential compliance needed for additional information or documentation to be obtained prior to or during the on-site evaluation visit). The evaluation format may also be used by the on-site evaluation team to make notes of issues raised in their review of the Self-Study Report prior to the visit, for observations and fact finding during the visit, and for comments including information that serves as a basis for judgment about the potential accreditation status which may be used in completing their Site Visit Report.

3. Self-Study Report

Sample Front Cover

SELF-STUDY REPORT

Data Presented for Consideration of the
(Name of Review Committee)

By

(Name of Sponsoring Institution and Program Address)
(Name of Program Official with Title)

(Date)

Sample Last Page

Date

Report Submitted by:

(Signature of Program Official)

Name of Program Official (Printed)

Title

Address

Telephone

RECOMMENDED FORMAT FOR SELF-STUDY

FORMAT OF ESSENTIALS	SELF-STUDY REPORT SUGGESTIONS	SUGGESTED EXHIBITS
<p>Description of a Montessori Teacher</p> <p>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.</p> <p>I. <u>Sponsorship</u></p> <p>A. The sponsoring institution must be clearly identified and described in writing. In programs provided by two or more institutions, responsibility 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.</p> <p>B. Accredited educational programs may be established by a lawful institution or person whose purpose includes the operation of Montessori teacher education.</p> <p>C. Accreditation is granted to the sponsoring institution that assumes primary responsibility for curriculum planning and selection of program content; appoints program faculty; coordinates</p>	<p>A. Describe how the sponsoring institution oversees the educational program.</p> <p>State the overall educational objectives of the sponsoring institution.</p> <p>B. Identify and describe requirements (if any) for lawful operation of program.</p> <p>C. Describe the current accreditation maintained by the institution and the program.</p> <p>Describe the policies and procedures the responsibilities and personnel roles, and the geography and associated logistics as they relate to program affiliates.</p>	<p>A. Provide an organizational chart of the program in relation to the rest of the sponsoring institution's legal operating instrument and pertinent by-laws.</p> <p>B. Provide a copy of sponsoring institution's recognition by pertinent government agency.</p> <p>C. Provide copies of the most recent notification of accreditation.</p> <p>Provide a copy of a current affiliation agreement.</p> <p>Provide a list of all current affiliates.</p>

<p>II. Resources</p> <p>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.</p> <p>B. Personnel</p> <p>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.</p> <p>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.</p> <p>3. Instructional Staff Faculty members must be knowledgeable and effective in teaching the assigned subject.</p> <p>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.</p> <p>C. Financial Resources Financial resources shall be assured to fulfill obligations to enrolled students.</p>	<p>A. Describe the process of determining number of students relative to resources. State the schedule and frequency of matriculation, and the relationships of multiple courses or programs in progress, if present.</p> <p>B. 1. Describe function and responsibility of pertinent institutional administration.</p> <p>2. Describe and list responsibility and qualifications for each program official.</p> <p>Describe the process by which the performances of program officials are evaluated.</p> <p>Describe the assigned responsibilities of each member of the instructional staff.</p> <p>List the qualifications for each faculty position and supervisory personnel.</p> <p>3. Describe the effectiveness of the policy that encourages professional development for faculty.</p> <p>4. List each instructor's participation in professional development.</p> <p>C. Discuss the funding of the program. Include the history and sources of this funding.</p> <p>Describe the roles of the program officials and instructors in budget development and expenditure control.</p>	<p>A. Provide records of number of students or class sizes for the past three years, and a future projection.</p> <p>B. 1. Provide organizational chart of program.</p> <p>Provide job description and brief background for each program official.</p> <p>Provide list of all program officials with brief summary of their educational and professional qualifications and pertinent assigned area of responsibility and function</p> <p>2. Provide brief summary of educational and professional qualifications for all faculty.</p> <p>4. Provide the professional development policy documents.</p> <p>C. Provide copies of program budgets and/or other financial statement(s), broken into appropriate categories, for last year, this year, and next year.</p>
---	--	---

<p>D. Physical Resources Adequate facilities, equipment and learning resources shall be provided.</p> <p>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:</p> <p>A. Learning experiences and subject matter sequencing which develops the competencies of a Montessori teacher.</p> <p>B. Clearly written learning objectives and competencies to be achieved consistent with being a Montessori teacher.</p> <p>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.</p> <p>IV. Students 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.</p>	<p>D. Describe the physical facilities used by the program, including those at affiliates. Note any planned changes.</p> <p>Discuss utilization of instructional aids and practical teaching materials in the program. Discuss their availability for use by students and instructional staff.</p> <p>Describe the use of publications and other written resources by program students and faculty.</p> <p>A. Describe the curriculum, stating in brief the philosophy, objectives, duration, courses, sequencing, prerequisites, and other special aspects. Describe the curriculum development process. Describe the supervised teaching and/or observation practices of the program.</p> <p>C. Describe how student progress is evaluated. Describe how evaluation techniques and tools used were developed and themselves evaluated.</p> <p>A. Describe the process by which students are made aware of the educational program in all of its segments.</p>	<p>D. Provide a list of instructional materials available to the program.</p> <p>Provide a list of texts, periodicals, and references, published within the past five years, which are pertinent and accessible to program students.</p> <p>A. Provide the full curriculum outline showing each course/ unit/ structured detail to make clear its content and scope; include course numbers, hours, etc. (A version in a published catalog is not likely to be sufficient.) List textbooks and other references required or suggested for student learning experiences</p> <p>B. Provide a copy of the competencies needed for graduation.</p> <p>Provide a list of supervised practical teaching and observation schedules including supervisor, place, and name of experience.</p> <p>C. Provide samples of examinations and other evaluation processes.</p> <p>A. Provide the latest edition of the annual catalog. Provide any program brochures available.</p> <p>Provide any programs admissions and enrollment application information which is made available.</p>
---	---	---

<p>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 defines and published.</p> <p>C. Evaluation Criteria for a 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 objective 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.</p> <p>D. Guidance Student guidance shall be available to include assisting students in understanding and observing program policies practices.</p> <p>V. Operational Policies</p> <p>A. Fair Practices</p> <ol style="list-style-type: none"> 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 	<p>B. Briefly describe the admissions process for the institution and the program. Describe the role of counseling in admissions processing.</p> <p>C. Describe how advanced placement, if any, is handled; include a discussion of awarding credit, if any, for previous learning experiences. List the criteria used for evaluating the successful completion of each course and of the entire program.</p> <p>D. Describe student guidance services for both the institution and the program.</p> <p>A. 1. Describe how and to whom the program is advertised.</p> <p>2. Describe student and faculty recruitment procedures.</p>	<p>C. Provide copy of certificate of graduation.</p> <p>D. Provide a copy of the written policy and process.</p> <p>A. 1. Provide samples of program advertisements and announcements.</p> <p>2. Provide a copy of the non-discriminatory statement used by the institution.</p> <p>3. Provide a copy of the published tuitions and other statements.</p> <p>4. Provide a copy of the refund policy.</p> <p>Provide a copy of the policy and procedures relative to practical student work experience.</p>
---	---	---

<p>applicants.</p> <p>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.</p> <p>VI. Program Evaluation</p> <p>A. The program must have a continuing system for periodically and systematically reviewing the effectiveness of the program including a formal self-study.</p> <p>B. The results of program evaluation must be appropriately reflected in review of the curriculum and other elements of the program with appropriate revision.</p>	<p>B. Describe all records related to the program. Indicate how and where they are kept, and how they are used.</p> <p>A. Describe the ongoing process of program review. Discuss how this process has affected the program.</p>	<p>B. Provide examples of each of the listed records.</p> <p>A. Provide the written policy/procedures document for program review; e.g., forms which survey graduates as to satisfaction with the program and evaluating program results.</p>
--	--	---

Self-Analysis Summary

1. List the major strengths of the program separately, in order of importance.
2. List the major concerns for the program separately, in order of importance, with annotations on reasons for the concerns. Identify those concerns which appear as deficiencies in compliance with Essentials and Criteria and those which appear as marginal compliance. Include a description of how these concerns could be addressed, providing specific recommendations where possible.
3. Describe a plan for implementing the recommendations for improvement, including the intent and the elements of the plan.
4. Describe any progress already achieved in implementing improvements.
5. Describe any constraints within or beyond the sponsoring institution that might interfere with implementing the improvements needed to assure that the program is in substantial compliance with the Essentials and Criteria.

4. Evaluation for Potential Compliance Format

REVIEW COMMITTEE OF _____ EVALUATION OF SELF-STUDY REPORT FOR POTENTIAL COMPLIANCE WITH ESSENTIALS AND CRITERIA

Name of Program

Date

This evaluation form is used to compare information provided in the program's Self-Study Report with the *Essentials and Criteria* to assure its sufficient completion for a satisfactory on-site evaluation visit. This form may also be used by the on-site evaluation team prior to or during its own review of the program's compliance with the *Essentials and Criteria*.

Review the Self-Study Report with respect to each of the indicated sections of the *Essentials and Criteria*. For any "incomplete" or "no compliance" response, indicate what further information or documentation would be useful or necessary to satisfactorily resolve the matter. Indicate also if this "incompletion" or "no compliance" may be satisfactorily resolved at the on-site evaluation visit, or whether it may be more effectively resolved prior to such visit; and how such resolution may be accomplished. Use back of pages or attachments if additional space is required for comments.

Indicate also under "Comments" any additional remarks you believe will be helpful to the on-site evaluation visit or any other aspects of the overall program review. Complete this evaluation form and return it within (number of days) to: (name/address of review committee, if applicable).

The completed evaluation form from each review committee member will be given to all other pertinent committee members and a decision will be made for scheduling of a definite on-site evaluation visit. Based on consensus findings, these forms or a single

form may be given to the on-site evaluation team members for their conduct of the on-site visit.

(The *Essentials and Criteria* are written out word-for-word under each indicated heading on the form below. The model format uses only major headings here to conserve space)

POTENTIAL COMPLIANCE

Yes Incomplete No

Description of a Montessori Teacher
Comments:

— — —

POTENTIAL COMPLIANCE

Yes Incomplete No

I. Sponsorship
Comments:

— — —

II. (A) General Resources
Comments:

— — —

III. (B) Personnel
Comments:

— — —

IV. (C) Financial Resources
Comments:

— — —

V. (D) Physical Resources
Comments:

— — —

VI. Curriculum
Comments:

— — —

VII. (A) Program Description

Comments:

VIII. (B) Admission Policies and Procedures

Comments:

POTENTIAL COMPLIANCE
Yes Incomplete No

IX. (C) Evaluation

Comments:

X. (D) Guidance

Comments:

XI. (A) Fair Practices

Comments:

XII. (B) Student Records

Comments:

XIII. Program Evaluation

Comments:

Summary

- The Self-Study Report is sufficiently complete to schedule an on-site evaluation visit.
- The Self-Study Report is incomplete in the critical areas indicated and an on-site evaluation visit is not suitable for scheduling until satisfactory resolution is accomplished.
- The Self-Study Report is in no compliance in the critical areas indicated and an on-site evaluation visit is not suitable for scheduling until satisfactory resolution is accomplished.
- Although the Self-Study Report is generally complete, an on-site evaluation visit is not advisable for scheduling now for the following reason(s):

Further Comments: (Suggestions for on-site evaluation visit, suggested remedy to enable on-site visit; other remarks not included elsewhere on this form)

Date

Name and Title Printed (Signature)

C. PROGRAMMATIC SITE VISIT

1. Policy Statements

The Council:

- ❖ Requires an on-site evaluation visit to the program as an integral part of its accrediting process, with the findings and conclusions presented in a Site Visit Report, to assist review committees and the Council in assessing an applicant program's relative compliance with the Essentials and Criteria.
- ❖ Encourages the development and widespread use of site visit orientation, guidance, and instruction manuals.
- ❖ Requires that site visitors be well oriented, objective, and familiar with the program's Self-Study Report and other relevant materials.
- ❖ Encourages the composition of site visit teams to include at least one person who is not a member of the review committee or its staff.
- ❖ Encourages the preparation of site visit agendas which provide opportunities for discussion between team members and faculty, staff, administrators, students, and other interested parties.
- ❖ Expects site visitors to arrive on time, to maintain the established schedule of interviews and other functions, to complete an initial draft of the Site Visit Report before the oral presentation of program strengths and weaknesses during the exit conference, to remain on site through the exit conference, and to leave promptly after its conclusion.
- ❖ Encourages review committees and team members to use a document modeled after the Recommended Format for the Site Visit Report.
- ❖ Requires review committees to provide the chief executive officer of the sponsoring institution and the director of the program with an opportunity to comment on the report of the site visit team and to correct factual errors.
- ❖ Acknowledges that the Site Visit Report remains the property of the sponsoring institution.

Detailed procedures in conducting a site visit may be found in the document entitled "General Orientation Guide to Programmatic Accreditation of the Generic Review Committee of the International Montessori Accreditation Council".

D. RECOMMENDED FORMAT FOR THE SITE VISIT REPORT

1. Policy Statement

The Council provides the Recommended Format for the Site Visit Report to encourage consistency in the scope, format and style of Site Visit Reports. The final section of the Recommended Format contains a requirement for a review of the program's summary of its self-analysis, based on information gained during the site visit.

2. Procedure

Since the Recommended Format for the Site Visit Report was designed to follow the *Essentials and Criteria*, review committees will modify the content and/or sequence to accommodate its own particular *Criteria* and *Guidelines* (if any), incorporating the principles embodied in the Recommended Format as feasible. The Site Visit Report only indicates briefly the various major headings of the *Essentials and Criteria* to provide a consistent form for presenting comments, conclusions and findings to the review committee and other interested parties. During the visit, the On-Site Evaluation Team may use the recommended format for the Self-Study Report which includes a detailed word-for-word statement of the pertinent *Essentials and Criteria* and any related Guidelines.

3. Site Visit Report

International Montessori Accreditation Council

SITE VISIT REPORT

Conducted on behalf of

(Name of Review Committee)

Name of Program/Sponsoring Organization

Street City State Zip Code

Program Director Telephone ()

Date of on-site visit

Date of written report

Prepared and Submitted by:

Name (Team Leader) Title/Organization Telephone ()

Street City State Zip Code

Name (Team Member)	Title/Organization	() Telephone
--------------------	--------------------	------------------

Street	City	State	Zip Code
--------	------	-------	----------

Name (Team Member)	Title/Organization	() Telephone
--------------------	--------------------	------------------

This Site Visit Report is to be completed and signed jointly by all members of the On-Site Evaluation Team and returned to (name/address of review committee) within (number of days) following completion of the visit. The Program Director and other pertinent program officials (if applicable) are sent copies of the report within (number of days) following completion of the visit in order that they may provide written comments and correction of factual errors and conclusions before final action is taken by the review committee. Responses directed to the review committee must be in writing and received by the committee within (number of days) of the date of receipt of the report by the pertinent program officials. The program's written response (and any supporting documentation) is added to the report, and copies are sent by the review committee staff to all committee members at least (number of days) before the committee meeting scheduled to consider recommendation for the program's accreditation with the Council.

COMPLIANCE WITH *ESSENTIALS AND CRITERIA**

Yes Partial No

*(If 'Partial' or 'No' compliance is checked, comment on the deficiency. For 'Yes', comments on areas of exceptional strength)

Description of a Montessori Teacher
 Comments: _____ _____ _____

I. Sponsorship
 Comments: _____ _____ _____

II. A. General Resources
 Comments: _____ _____ _____

II. B. Personnel
 Comments: _____ _____ _____

	Yes	Partial	No
II. C. Financial Resources			
Comments:	—	—	—

II. D. Physical Resources			
Comments:	—	—	—

III. Curriculum			
Comments:	—	—	—

IV. A. Program Description			
Comments:	—	—	—

IV. B. Admission Policies and Procedures			
Comments:	—	—	—

IV. C. Evaluation			
Comments:	—	—	—

IV. D. Guidance			
Comments:	—	—	—

V. A. Fair Practices			
Comments:	—	—	—

V. B. Student Records			
Comments:	—	—	—

VI. Program Evaluation			
Comments:	—	—	—

Review of Program's Summary of its Self-Analysis, based on Information Gained during the Site Visit.

Additional Comments; e.g., recommended accreditation action by review committee (if applicable), concluding general summary, issues for further consideration in accreditation process, assessment of procedures/format of on-site visit, etc.

(signature) _____
Date

Name of Team Leader _____
Date

(signature) _____
Date

Name of Team Member _____
Date

(signature) _____
Date

Name of Team Member _____
Date

Suggested Appendix: list of name/titles of those individuals with whom the On-Site Evaluation Team met during the visit; e.g., administrative officials, instructional staff (areas of responsibility), enrolled students, recent graduates, personnel from affiliated institutions, other persons.

E. COORDINATED AND CONCURRENT SITE VISITS

1. Policy Statements

The Council:

- ❖ Encourages institutions which sponsor more than one Montessori teacher education program to request coordinated or concurrent site visits and encourages review committees to participate in the joint surveys.
- ❖ Permits review committees to conduct coordinated or concurrent visits, providing that the review committee ensures that all applicable Council policies and procedures are observed, that the integrity of the Essentials and Criteria are preserved, and that the confidentiality of all information obtained is maintained.

2. Procedures for Coordinated and Concurrent Site Visits

The Council cooperates with review committees as well as specialized and regional accrediting agencies in joint visits: concurrent surveys (two or more surveys occurring at the same time) and coordinated surveys (two or more visiting teams following an integrated schedule). Coordinated surveys, which come in response to specific requests from institutions, provide for a single review of administrative services and resources, with this information to be shared by the programmatic site visitors. These visitors retain full responsibility for surveying components unique to the programs relating to their own scope of activity. Such coordinated surveys may be part of an institutional survey or take place with surveys of various Council-related groups or of other specialized accrediting agencies. The accreditation status of any single program is not contingent upon the status assigned to any other educational program within the same sponsoring institution.

(a) Institutional Coordinator: Both concurrent and coordinated surveys require that a person at the sponsoring institution be responsible for on-site coordination of the surveys. This coordinator represents the sponsoring institution in providing liaison with the participating committees and the Council. The institutional coordinator is responsible for verifying that program Self-Study Reports are distributed to appropriate review committees and for preparing and providing the review committees with site visit schedules for their review and approval. The institutional coordinator also makes local arrangements for lodging and meeting rooms for site visitors.

(b) Administrative Generalist: For coordinated surveys, an administrative generalist is appointed with concurrence of the review committees and the sponsoring institution. The administrative generalist serves as the chairperson for the Council-related accreditation surveys.

At the initial meeting with institutional personnel, the administrative generalist reviews the purpose of the site visit, the processes to be followed, and any changes needing attention. The administrative generalist also chairs pertinent meetings of the Council-related surveyors during the site visit. The administrative generalist assists the site visit team members in their verification of information about the sponsoring institution's general administrative operation. The generalist also prepares a report of these findings for distribution to administrative personnel of the sponsoring institution, to site visitors, and to review committees.

- (c) **Site Visitors:** Site visitors are selected and assigned by each of the participating review committees. The respective review committees provide their representatives with information explaining travel and hotel accommodations and expense reimbursement practices; site visit schedules; copies of the Self-Study Report; and instructions for writing the Site Visit Report.

Team leaders consult with the institutional coordinator and the administrative generalist should the team desire any significant change in site visit schedules. Team leaders provide the necessary direction to the on-site activities of their respective teams; serve as the spokes-person for their team at the exit interview; and direct the team's preparation of the written Site Visit Report for submission to their review committee following conclusion of the site visit.

F. CONDUCTING THE SITE VISIT

[Cover Page]
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**

[Address]

[Phone]

Date

[Body of General Orientation Guide]

This GENERAL ORIENTATION GUIDE to the PROGRAMMATIC ACCREDITATION PROCEDURES OF THE 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 IMS Review Committee will provide site visitors with program-specific information and guidance.

CONTENTS

INTRODUCTION -----	1
INQUIRIES AND GENERAL INFORMATION -----	1
SUMMARY OF COUNCIL ACCREDITATION -----	2
PROGRAM REVIEW	
Application for Accreditation-----	2
Generic Review Committee Response-----	2
Self-Study-----	2
Self-Study Report-----	3
On-Site Evaluation Team Visit-----	3
1. Team Composition-----	3
2. Team Activities-----	4
Model Site Visit-----	4
Site Visit Report Procedures-----	9
Generic Review Committee Evaluation-----	10
Committee Reconsideration of Recommendations-----	10
COUNCIL ACCREDITATION	
Council Advisory Committee Activity-----	11
Ensuring Due Process-----	11
Confidentiality in the Accreditation Process-----	11
Accreditation Fees-----	12
CHARTS	
I. Ten Commandments for the Site Visit Team-----	13
II. Characteristics of Successful Site Visitors-----	14

APPENDICES

A. Essentials and Criteria -----	A-1
B. Accreditation Categories -----	B-1
C. Program Site Visit Questionnaire (PSQ) -----	C-1
D. Application for Initial or Continuing Accreditation -----	D-1

INTRODUCTION

The **GENERIC REVIEW COMMITTEE** is established by the Board of Directors of the International Montessori Accreditation Council 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 and preferably include 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. Continuity and the expertise and resources to provide timely and effective communication is considered 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

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: (Generic Review Committee, c/o name/address) .

SUMMARY OF COUNCIL ACCREDITATION

- i. **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" is specified in the application, the matter is referred to this committee.
- ii. **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.
- iii. **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.
- iv. **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.
- v. **Council Accreditation:** The Council's Advisory Committee examines the recommendations made by the Generic Review Committee for consistency and clarity in relation to the *Essentials and Criteria*. The recommendation may be referred back to the Generic Review Committee 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

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 Generic Review Committee provides specific guidance in this self-study process by issuing instructions and materials to the program, including 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 resubmit 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.

- i. 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.

ii. 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

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:

- i. 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.
- ii. 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.
- iii. 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 Re-

- view Committee provides the program with a description of the process for requesting reconsideration.
- iv. The Advisory Committee of the Council acts on the review committee recommendation.
 - v. The sponsoring institution receives formal notification of the accreditation action by the Council.
 - vi. 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 nonverbal 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:
 - ❖ It is legible, clear and accurate, without important omissions.
 - ❖ 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.
 - ❖ Personal or unverified observations have been removed.

- ❖ Needed editorial improvements have been made.
- ❖ 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.

* 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.

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, ac-

creditation 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.

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:

- i. Specification of the area(s) in which the program is not in substantial compliance with the *Essentials and Criteria* and
- ii. 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

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.

TEN COMMANDMENTS FOR THE SITE VISIT TEAM*

- i. **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.
- ii. **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.
- iii. **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.
- iv. **DON'T BE A CANDIDATE:** Site visitors might see an opportunity to suggest themselves for a consultation, 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.
- v. **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.
- vi. **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.
- vii. **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.
- viii. **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.
- ix. **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.

- x. **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)*

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 C

PROGRAM SITE VISIT QUESTIONNAIRE

POLICY

The Council, in cooperation with the review committees, 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 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 review committees.

MODEL LETTER REQUESTING PROGRAM TO COMPLETE SITE VISIT QUESTIONNAIRE (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 arrangement 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-addresses 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

(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 report was:

1 2 3 4 5

Comment:

11. The site visitors' interaction with other related program staff or personnel during the 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 for, call _____ or write to:

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

For Office Use:

Date Mailed: _____

Date Returned: _____

APPENDIX D

INTERNATIONAL MONTESSORI ACCREDITATION COUNCIL

APPLICATION FOR INITIAL OR CONTINUING ACCREDITATION

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 in 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*. The 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)

SPONSORING INSTITUTION OFFICIALS

Chief executive officer

Title

Signature authorizing this application

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

PROGRAM OFFICIALS

Program director

Title

()

Telephone

Please return the completed Application for with application fee of _____ To:

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

III. ADMINISTRATIVE PRACTICES AND PROCEDURES

A. GUIDELINES FOR ADVERTISING ACCREDITATION STATUS

1. Policy Statement

The Council encourages all institutions sponsoring Council accredited programs, or individuals acting on their behalf, to follow guidelines which assure accuracy in advertising or otherwise announcing the accredited status of such programs.

- ❖ Citations regarding accreditation status must be clearly accurate and limited to the accredited program.
- ❖ Statement should not be made about possible accreditation status not yet conferred by the accrediting body.
- ❖ Statements concerning accreditation should not be the focal point in an advertisement.
- ❖ Singular citation by full title, initials, or acronyms should not be made either to the pertinent collaborating Montessori organization or to its review committee as the accrediting agency. If either entity is cited, it must be in conjunction with the Council, with either full titles, initials, or acronyms.

Institutions offering Montessori teacher education programs accredited by the Council in cooperation with the respective review committees may use any of the following statements or closely similar statements, in catalog announcements, descriptive or promotional information, and advertising.

(Name of program) is accredited by:

- ❖ the agency International Montessori Accreditation Council, in cooperation with the (review committee name, and initials or acronym).
- ❖ the agency International Montessori Accreditation Council.
- ❖ the agency International Montessori Accreditation Council in cooperation with (collaborating organization's name, initials or acronym).

B. DURATION OF ACCREDITATION AND CONDUCTING ACCREDITATION REVIEWS AT REASONABLE INTERVALS

1. Policy Statement

The Council:

- ❖ Requires review committees to determine an appropriate maximum accreditation period within the five-year limit established by the Council and to request review and sanction by the Council.
- ❖ Requires review committees to conduct accreditation reviews at reasonable intervals and to schedule the site visit reasonably close to the end of the period indicated in the Council notification letter.

2. Duration of Recognition

The Council has established five years as the maximum duration of accreditation and one year as the recommended minimum duration of accreditation. It is the mutual responsibility of review committees and program directors (or their institutional administrators) to arrange for self-study submittals and site visits in a manner that is timely and within the existing period of recognition.

The length of Council accreditation is expressed in years rather than with a specific termination date in order to allow for flexibility in completing the program review and determining an accreditation status. The one-year minimum is recommended to provide assurance of due process. The document "Classification of Accreditation Action" should be consulted for specific information on intervals of accreditation corresponding with specific categories.

Each accreditation status is formally granted by the Council and continues until another accreditation is conferred through the appropriate established procedure, following due process. Review committees may extend a resurvey day for a given program to accommodate a joint survey.

3. Procedures

Each review committee determines a desired time limit for the maximum duration of accreditation for each educational program area for which it has responsibility.

The maximum limit may be any duration of five or fewer years and should be responsive to such factors as the age of the review committee and that of the program; the evolving nature of the program curriculum or the level of training, and costs to sponsoring institution and review committee.

C. FEES FOR ACCREDITATION SERVICES

1. Policy Statements

The Council:

- ❖ Requires accredited and applicant programs to pay reasonable fees for the financial support of the regular Council operation.
- ❖ Allows review committees to charge reasonable fees to cover costs incurred in support of their accreditation services and in connection with site visit (site visitors serve without fee or honoraria).
- ❖ Offers advice and consultation to review committees regarding their proposed and existing expenditures and charges for accreditation services to encourage their cost-effective and efficient operation and procedures.
- ❖ Requires review committees to submit a financial statement of their expenses and income to the Council each year.

2. Fees to the Council

Fees are assessed by the Council to support its continuing regular operation. Such ordinary expenses as staff salaries, office expenses, rent, telephone, travel, postage and publication are within the bounds of such Council activity for which such fees are provided to meet. In addition, direct accreditation services provided by the Council's Generic Review Committee must be included within the Council's financial management procedures.

3. Application Fee

An application fee for program accreditation is set by the Council and required of programs for payment with submittal of the application form. This fee is intended generally to meet the Council's expenses in providing pertinent publications, communication and other Council support to complete the initial application process. An additional amount as may be required by the Council to meet reasonable further costs incurred in the application process in exceptional circumstances may be reasonably assessed by the Council upon prior notice and consultation with the applicant program. Accreditation services and site visit conducted under the Council's Generic Review Committee are expenses which are charged to the applicant program separately from the application fee and shall not exceed the minimum reasonable costs necessary for these services.

4. Annual Program Accreditation Fee

Accredited programs pay to the Council an annual accreditation fee which is submitted with their annual report. The amount of this fee is determined by consensus of the Board according to the number of units related to tuition income from the recent past year of program operation. A minimum annual fee (1 unit) is set to assure a reasonably equitable distribution of financial support amount all accredited programs. The value of such unit shall reflect the reasonable minimal requirements for effective Council operation; provided that such value may be altered only upon consensus of the Board; or otherwise by majority vote only within the limits of inflation or deflation as determined by the consumer price index or some other such reasonably accurate measure of economic variation.

<u>Tuition Income</u>	<u>Units</u>
Under \$10,000	1
" \$20,000	2
" \$30,000	3
" \$40,000	4
" \$60,000	5
" \$80,000	6
" \$100,000	7
" \$120,000	8
" \$140,000	9
Over \$140,000	10

Programs on first becoming accredited are required to pay an annual accreditation fee for that financial year based on the proportion of the year remaining after the program has become accredited, and the normal annual accreditation fee thereafter; but so that the first annual accreditation fee shall in any case be not less than one half of the full accreditation fee in that year.

D. ANNUAL REPORT

**ANNUAL REPORT TO THE AGENCY
INTERNATIONAL MONTESSORI ACCREDITATION COUNCIL**

Name of Program () Telephone

Name of Sponsoring Institution () Telephone

Mail to:

Street City State Country Zip Code

Program Director Title () Telephone

Street City State Country Zip Code

Tuition received during last fiscal year:

(from _____ to _____): _____

Number of students presently enrolled in the program: _____

Describe any significant changes in appointment of principal program personnel, affiliates, curriculum and other factors having a major or potentially substantial impact upon the character or quality of the program with respect to the program's compliance with applicable accreditation standards; i.e., Essentials, Criteria and Guidelines. (Use separate sheet; provide pertinent documents as necessary)

The information contained in the Annual Report is a true and accurate description of the program and sponsoring institution with respect to the information requested.

Program Director

Authorized Official of
Sponsoring Institution

Administrative Title

Administrative Title

Signature

Signature

Date

Date

IV. PUBLIC RESPONSIBILITY

A. CONFLICT OF INTEREST

1. Policy Statements

- (a) Members of the Council, review committees, and staff must refrain from participating in the discussion or vote on accreditation matters if for any reason a substantial conflict of interest or the appearance of a substantial conflict of interest can arise. Minutes of meetings must reflect this non-participation.

- (b) Other persons involved in the accreditation review process must withdraw from participation in that process if for any reason a substantial conflict of interest or the appearance of a substantial conflict of interest can arise.

2. Provisions to Avoid Conflict of Interest in the Site Visit Process

Site visitors who are competent to participate in the accreditation review process by virtue of their experience, training, and orientation are presented with opportunities to provide information to and receive information from faculty, staff, administrators, students, and other parties. Reasonable precautions are taken to ensure that site visitors develop and express objective opinions and decisions, free of self-interest and personal bias.

Persons should not serve as site visitors for a program if they

- ❖ are employed in Montessori teacher education in the immediate proximity of the sponsoring institution;
- ❖ have recently been employees of or paid consultants to the sponsoring institution, or have close relatives who are employees of the sponsoring institution;
- ❖ are not acceptable to the program.

B. COMPLAINTS REGARDING ACCREDITED PROGRAMS

1. Policy Statement

The Council and review committees follow due process procedures when complaints are received by review committees, by the Council, or by the collaborating organizations, which indicate that accredited programs, or programs which are seeking accreditation, may not be in substantial compliance with the Essentials and Criteria or may not be following established accreditation policies.

2. Procedures

- (a) To receive formal consideration, all complaints shall be submitted in writing and signed.
- (b) Complaints are transmitted to the chairperson of the appropriate review committee for consideration. Copies of this correspondence are shared with the chairperson of the Board of Directors through the Council staff.
- (c) Following consultation among staff of the review committee and of the Council, the chairperson of the review committee determines whether the complaint relates to the manner in which the program complies with the Essentials and Criteria or follows established accreditation policies.

- (d) If the complaint does not relate to the Essentials and Criteria or to established policies, the person initiating the complaint shall be notified accordingly by the review committee chairperson. A copy of this correspondence shall be shared with the Chairperson of the Council Board of Directors.
- (e) If the complaint is judged to relate to program compliance with the Essentials and Criteria or to accreditation policies, the following shall be observed:
 - i. The confidentiality of the complaining party shall be protected.
 - ii. The review committee chairperson or representative shall acknowledge receipt of the complaint and share with the filing party a description of the process and policies which pertain to handling such complaints.
 - iii. The review committee chairperson or representative shall notify the program director and the chief executive officer of the sponsoring institution of the substance of the complaint and shall request a preliminary investigation and report on the findings within 30 days of the sponsoring institution's receipt of the letter of notice.
 - iv. The review committee chairperson or representative may request further information or material relative to the complaint from the complaining party, the institution, or other relevant sources.
 - v. The Council staff should receive copies of this correspondence.
- (f) On receipt of the responses referred to in (c)(2)(iii) and (iv) above, the review committee shall consider the complaint and all relevant information obtained in the course of investigation and formulate an appropriate action according to the following guidelines:
- (g) If the complaint is determined to be unsubstantiated or unrelated to the *Essentials and Criteria* or established accreditation policies, the complaining party, officials of the program in question, and the appropriate official of the sponsoring institution will be so notified.
- (h) If the investigation reveals that the program may not be or may not have been in substantial compliance with *Essentials and Criteria* or may not be or may not have been following the established accreditation policies, one of two approaches shall be taken.
 - i. The program may submit a report and documentation demonstrating the manner in which the substantiated complaint has been corrected. Should the review committee be satisfied with this response, the program, its sponsoring institution, and the party filing the complaint should be notified of the committee's satisfaction with the resolution of the matter and notice that the program's accreditation status remains unaffected by the complaint.
 - ii. Should the review committee judge the program or sponsoring institution's response to the complaint inadequate and lacking in evidence of the program's continuing substantial compliance with the *Essentials and Criteria* or adherence to accreditation policies, the review committee may request and arrange for a return site visit of the program. The purposes of the return site visit shall be limited to an investigation of the complaint and the

manner in which it affects compliance with the Essentials and Criteria or with accreditation policies. The cost of the return site visit shall be initially borne by the review committee.

- (i) Should the review committee, on evidence received through the return on-site evaluation, consider the program to remain in substantial compliance with the *Essentials and Criteria* and in adherence with accreditation policies, the program, its sponsoring institution, and the complaining party shall be notified of this assessment and the fact that the program's current accreditation status remains unaffected by the complaint.
- (j) Should the review committee consider the evidence of the site visit to indicate the complaint is valid and that the program is not in substantial compliance with the *Essentials and Criteria* or with accreditation policies, the review committee shall recommend a change in accreditation status to the Council and the program shall be charged for the cost of conducting the pertinent site visit. Parties referred to in (ii)[a] above shall be advised of Council action.
- (k) Should (d)(2)(ii)[b] pertain, all information regarding the complaint, a full report of its investigation, and the review committee's recommendation shall be transmitted to the Council for its consideration and action.
- (l) The Council emphasizes that it will not intervene on behalf of individuals or act as a court of appeal for faculty members or students in matters of admission, appointment, promotion or dismissal. The Council will intervene only when it believes practices or conditions indicate the program may not be in substantial compliance with the Essentials and Criteria or with established accreditation policies.

C. REVIEW COMMITTEE RECONSIDERATION OF RECOMMENDATIONS OF ACCREDITATION WITHHELD, ACCREDITATION WITHDRAWN, AND PROBATIONARY ACCREDITATION

1. Policy Statement

The Council requires review committees to develop and disseminate procedures for reconsidering accreditation recommendations of **Accreditation Withheld, Accreditation Withdrawn, and Probationary Accreditation**.

2. Review Committee Reconsideration of Recommendations to Withhold or Withdraw Accreditation

The review committee informs the sponsoring institution of the program of its recommendation to the Council to withhold or withdraw accreditation, including

- (a) Specification of the areas in which the program is not in substantial compliance with the *Essentials and Criteria*, and
- (b) A description of the process for reconsideration, including the time within which a request must be made. The process is designed to expedite reconsideration activities in a manner that is compatible with the size and structure of the review committee.

If there is no request for review committee reconsideration of the accreditation recommendation within the stipulated time, the Council Advisory Committee acts on the recommendation at its next regularly scheduled meeting.

3. Review Committee Reconsideration of Recommendations of Probationary Accreditation

The review committee informs the sponsoring institution of the program of its recommendation to the Council of **Probationary Accreditation**, including (a) and (b) immediately above.

If there is no request for review committee reconsideration of the accreditation recommendation within the stipulated time, the Council's Advisory Committee acts on the recommendation at its next regularly scheduled meeting.

Council awards of Probationary Accreditation following review committee reconsideration of a recommendation are final and are not subject to appeal.

D. COUNCIL APPEALS PROCEDURES FOR ACCREDITATION WITHHELD OR WITHDRAWN

1. Policy Statement

The Council provides clearly delineated procedures for programs wishing to appeal actions of Accreditation Withheld or **Accreditation Withdrawn**. These procedures follow due process.

2. Criteria for and Initiation of an Appeal

An appeal filed in accord with the Council Appeals Procedures shall automatically delay the decision to withhold or withdraw accreditation until its final disposition. Sponsoring institutions are entitled to file an appeal only in the event of a Council action to withhold or withdraw accreditation.

All required notices and correspondence referred to herein shall be sent by certified mail, return receipt requested, or other equivalent means to assure delivery and receipt.

The chief executive officer of an institution sponsoring a program which has had accreditation withheld or withdrawn by the Council may request a hearing before an appeals hearing panel. Appeals may be based only on the contention that the Council decision was 1) arbitrary or capricious or 2) not supported by documented evidence of deficiencies in compliance with the *Essentials and Criteria* and/or administrative requirements. The sponsoring institution's request for a hearing shall be made in writing and shall include a concise statement of the basis on which the accreditation decision is being contested. The request must be received by the Council within 15 days after the program receives the Council's notice of its action to withhold or withdraw accreditation.

3. Criteria for Selecting an Appeals Hearing Panel

An appeals hearing panel shall be composed of qualified individuals (preferably three (3) in number) who are familiar with the accreditation process and who have a knowledge of the *Essentials and Criteria*. No individual is eligible for membership on an appeals hearing panel who is or has been previously directly involved

with the sponsoring institution or the particular accreditation activity under consideration or who is a current member of the Council's Board of Directors, staff, the respective review committee, or the governing body of a collaborating organization which sponsors the review committee.

4. Process for Selecting an Appeals Hearing Panel

A list of individuals (preferably five (5) in number) qualified to serve as members of an appeals hearing panel shall be prepared under the direction of the Council from recommendations submitted by the collaborating organization that sponsors the review committee responsible for the evaluation of the program. For programs evaluated by the Generic Review Committee, the Council Board of Directors selects the list of individuals in consultation with the program and its sponsoring institution. The list of individuals shall be sent to the sponsoring institution within 20 days of the Council's receipt of the request for a hearing. Within 10 days of the sponsoring institution's receipt of the list, the sponsoring institution shall select or otherwise confirm acceptance of a specified number of individuals (preferably three (3) in number) from the list to constitute the appeals hearing panel, and shall notify the Council of the names of the persons selected. All members of the appeals panel shall be acceptable to the program; provided however that any objection is communicated to the Council in writing within the specified ten (10) day period, with substantial reasons for the objection, and offering a qualified alternative person who is willing and able to serve in this capacity.

5. Appeals Hearing Date and Participants

The hearing shall be held as soon as feasible and within 60 days after the selection of the appeals hearing panel. The members of the appeals hearing panel shall select one of their members as chairperson. The chairperson shall establish the date, time, and place for the hearing in consultation with the chief executive officer of the sponsoring institution appealing the accreditation decision. At least 20 days before the hearing, the sponsoring institution shall be notified by the Council of the date, time, and place of the hearing and shall be provided with any information which contributed to the decision to withhold or withdraw accreditation, including a specific statement of reasons for the accreditation decision. At hearings conducted before the appeals hearing panel, sponsoring institutions may offer testimony and question any on-site evaluation team member or members who participated in the review or evaluation of the program. At least 10 days before such a hearing, the sponsoring institution shall request in writing the presence of any individual associated with the Council whom it wishes to question. Such requests shall be directed to Council. Review committee representatives may be present at the hearing to provide information as necessary.

6. Appeals Hearing Panel Recommendation and Final Council Action

The recommendation of the panel shall be based on the evidence presented to the review committee with regard to the conditions which existed in the program at the time of the latest site visit and on information about subsequent changes filed with the review committee prior to or at the time of review committee reconsideration. The findings and recommendations of the appeals hearing panel shall be submitted by its chairperson in writing to the Council's Advisory Committee and the sponsoring institution within 10 days after the hearing date. The decision of the Council's Advisory Committee shall be based on the findings of the appeals

panel with respect to the matter at issue and shall be final. The Council shall promptly notify the sponsoring institution of the decision of the Advisory Committee. This notification shall state specific reasons for the accreditation decision.

7. Financial Responsibility for an Appeals Hearing

The sponsoring institution making the appeal shall bear the expense involved in the development and presentation of its appeal; including the payment of a reasonable appeal hearing fee to the Council. Expenses directly associated with the hearing, such as those for the meeting room and for travel, meals, and lodging for members of the panel, shall be kept to a minimum and shall be divided equally between the Council and the sponsoring institution making the appeal; provided however, that the sponsoring institution shall submit its portion of such expenses in addition to the Council hearing fee in advance to the extent possible under the circumstances; and that any extraordinary expenses incurred due to the objection of the sponsoring institution to the composition of the hearing panel shall be borne entirely by the sponsoring institutions. Reasonable expenses of witnesses directly associated with the hearing shall be borne by the party requesting their presence. If the appeals hearing panel, or the Council requests a transcript of the hearing, the expenses shall be divided equally between the Council and the sponsoring institution. If the appealing sponsoring institution requests a transcript, such sponsoring institution will bear the entire expenses.

8. Extension of Time Limits

The time limits specified above may be extended with the mutual consent of the sponsoring institution, the Council and the appropriate review committee.

E. RIGHTS AND RESPONSIBILITIES OF INSTITUTIONAL SPONSORS OF PROGRAMS ACCREDITED BY THE COUNCIL

1. Introduction

The Council recognizes the importance of balancing individual needs and interests with the interests of all parties concerned in the operation of Montessori teacher education programs. The Council acknowledges that as circumstances change, the current *Essentials and Criteria* may become inconsistent with this balance and that future reviews and revisions of the *Essentials and Criteria* may be needed to maintain a proper balance in the accreditation process.

The following statement of institutional rights and responsibilities complements the Recommended Format for *Essentials and Criteria*.

2. General Rights

The Council and the review committees with which it cooperates believe that sponsoring institutions of programs accredited by the Council have fundamental rights which complement their responsibilities. The sponsoring institution has the right to expect:

- (a) that the Council and its cooperating review committees will conduct their business fairly, with proper regard for the sponsoring institution's freedoms, objectives and rights.
- (b) that the accreditation standards and guidelines will be appropriate and reasonable. This right includes the expectations that accreditation standards and

review processes will be published and reasonably accessible for review and that the standards will be appropriate and applied consistently over time and among applicable programs, thereby demonstrating their reliability and validity.

- (c) that on-site evaluation team members will be qualified and prepared for the assigned review of the designated program, that they will be sensitive to its unique environment as well as to that of its institutional sponsor, and that they will respect the confidentiality of the information which is obtained.
- (d) that there will be timely communication and notice of accreditation actions.
- (e) that the accreditation process will be conducted in a cost-effective manner; that documented descriptions and analyses of the program as a whole and in its various parts will be kept to the minimum necessary; that the site visit itself will not be prolonged; that requests for coordinated and consolidated on-site reviews will be accommodated whenever possible; and that accreditation fees and charges will be reasonable.

3. Specific Rights and Responsibilities

In addition, there are specific rights of the sponsoring institution of a Council-accredited program. These rights complement the responsibilities that are stated and implied in the *Essentials and Criteria*. Identified below are amplifications on selected responsibilities from among those stated in the Council's *Essentials and Criteria*.

- (a) **Sponsorship**. The sponsoring institution has the right to take the following actions without approval from a review committee or the Council:
 - i. to define and establish its own organizational and administrative structure and management.

The sponsoring institution has a responsibility to inform the review committee and the Council of changes in appointment of principal program personnel, affiliates, curriculum, and other factors having a major or potentially substantial impact upon the character and quality of the program.
 - ii. to select and to change affiliates.

The sponsoring institution has a responsibility for assuring quality, availability of resources, supervisory accountability for and integrity in the education conducted within its affiliates.
 - iii. to determine the format and content of contractual agreements in accord with the policies of the institutions involved in the contract.

The sponsoring institution has a responsibility to describe clearly in writing its own obligations and those of its affiliate(s) regarding program administration, curriculum, instruction, supervision and the like.
- (b) **Resources**. The sponsoring institution has the right
 - i. to provide and manage its physical resources in accord with its overall requirements and policies.

The sponsoring institution has a responsibility to insure that the resources and facilities required for effective learning and educational experience are adequate for the needs of the number of students enrolled.

- ii. to choose its own financial practices, including those for raising and allocating funds, and for budgeting, accounting and auditing.

The sponsoring institution has a responsibility to insure that there are sufficient funds to sustain the quality of the program until commitments to currently matriculated students are satisfied.

- iii. to assess qualifications, hire, promote, grant tenure, assign duties, and apportion the time for program administrators, faculty and support staff in accord with its own policies. The sponsoring institution has the right to monitor; and provide opportunities for the continuing competence of its faculty by the most appropriate and feasible means at its disposal.

The sponsoring institution has a responsibility to monitor and promote the continuing competence of its faculty and to assure that members are knowledgeable and effective in teaching the assigned subjects.

- iv. to identify and hire individuals to assume the responsibilities of each designated administrative position.

The sponsoring institution has a responsibility to select individuals who are qualified, as demonstrated by significant competence in or potential for competent administration.

(c) **Students.** The sponsoring institution has the right

- i. to establish admission requirements and to select students in accord with its policies.

The sponsoring institution has a responsibility to formulate policies for admission and acceptance of students that are in consonance with the accreditation standards. It is also responsible for publishing admission requirements and selecting students in a fair and equitable manner.

- ii. to determine the manner in which it maintains permanent student records.

The sponsoring institution has a responsibility to retain official records for each student so that documentation of the student's attendance and performance is available if needed by the graduate or external agencies in later years.

(d) **Fair Practices.** The sponsoring institution has the right to determine the manner in which it observes and satisfies the fair practice requirements of accredited programs.

(e) The sponsoring institution has a responsibility to accurately reflect in its advertising and other statements about the program what it offers; to observe non-discriminatory practices in student and faculty recruitment, matriculation, and promotion; to provide adequate safe guards for the health and safety of students, faculty and children which may be associated with the students'

learning activities; to limit program requirements to educational experiences; and to provide all faculty and applicants with published statements of policies and processes which are fair and reasonable to students and to faculty.

- (f) **Self-Study.** The sponsoring institution has the right to define its own means of conducting on-going self-evaluation.

The sponsoring institution has a responsibility to prepare the Self-Study Report in a mutually acceptable format. The self-study process should address outcomes.

V. COUNCIL ACCREDITATION HANDBOOK

The Council provides its basic "Accreditation Handbook" as general reference information and introduction to the Council and its accreditation activities. The "Accreditation Handbook" is provided to programs and other interested persons who inquire with the Council or its review committees as an initial basis to proceed with Council accreditation.

IMAC ACCREDITATION HANDBOOK

Table of Contents

General Overview of Accreditation	1
Summary of Council Organization	2
Organizational Chart of Council	4
Summary of Steps to Accreditation	5
Review Committees	6

APPENDICES

APPENDIX A ADMINISTRATIVE PRACTICES AND PROCEDURES

A. Guidelines for Advertising Accreditation Status	A-1
B. Duration of Accreditation and Conducting Accreditation	
Reviews at Reasonable Times	A-2
1. Policy Statements	A-2
2. Duration of Recognition	A-2
3. Procedures	A-2
C. Fees for Accreditation Services	A-3
D. Annual Report	A-5

APPENDIX B RIGHTS AND RESPONSIBILITIES

Rights and Responsibilities of Institutional Sponsors
of Programs Accredited by the Council

APPENDIX C ESSENTIALS AND CRITERIA

Including, "Maintaining and Administering Accreditation"

APPENDIX D APPLICATION FOR ACCREDITATION

GENERAL OVERVIEW OF ACCREDITATION

The agency International Montessori Accreditation Council (referred to as "Council" or simple "IMAC") is a private agency for the voluntary, non-governmental accreditation of educational programs for the preparation of Montessori teachers. This accreditation is provided within an umbrella structure of collaboration among various associated organizations, committees and other bodies which cooperate together according to specified accreditation standards, procedures and practices.

The Council's purpose is generally to improve the quality of Montessori teacher education programs by: (1) creating goals and standards for program improvement; (2) providing recognition for programs which meet specified standards; (3) assisting prospective students, employers and other interested persons in the identification of acceptable educational programs; (4) providing a more unified and dignified presentation of Montessori education to the world; and (5) offering a basis for the fair and impartial determination of eligibility for government financial assistance to accredited programs.

Programs seeking accreditation must comply with specified Council standards, **Essentials and Criteria**, which provide the basis for all Council review and recognition procedures and practices. These standards are employed by the Council in the completion of a series of steps in the accreditation process, which include a formal self-study, on-site evaluation visit and final accreditation decision by the Council's advisory committee. Based on the program's compliance with the **Essentials and Criteria**, the program is eventually granted formal "accredited" status with the Council.

The *Statement of Basic Accreditation Procedures* sets forth the Council's basic operating function in the accreditation process. Accreditation documents, policies and practices contained in this Statement have been adapted from those employed by the *Committee on Allied Health Education and Accreditation* (CAHEA), which has a long history of developing procedures for accreditation under the American Medical Association (AMA). The Council acknowledges with grateful appreciation the important contribution of CAHEA in the development of IMAC. Operation of Council accreditation is conducted in harmony with the two other basic Council documents: (1) **Essentials and Criteria**, the Council's accreditation standards and (2) Articles of Association, The Council's legal governing instrument.

SUMMARY OF COUNCIL ORGANIZATION

1. *General*

The Council conducts its accreditation in collaboration with various interrelated organizations and committees. A *Council Accreditation Handbook* with application form and general information is sent to those making inquiries with the Council. The applicant for accreditation must then respond by formally applying to the Council for this purpose, at which time the accreditation process is initiated. The Council then refers the program's application to the pertinent review committee to initiate the program's formal self-study and other evaluation procedures.

The review committee provides the applicant with its own written standards and procedures, which are contained essentially in a *General Orientation Guide*. The review committee then communicates directly with the program throughout the accreditation process of self-study and on-site evaluation visit. Following the on-site visit, the review committee recommends action for accreditation to the Council's advisory committee, which considers the matter for final decision. Each of the elements of the Council is briefly summarized below with reference to the organizational chart on page 4.

2. *The Council.*

The Council consists of: (a) Advisory Committee; (b) Board of Directors; and (c) Program Delegates. The Council as a whole serves as the essential umbrella agency to coordinate and manage all accreditation policies and procedures.

(a) **Advisory Committee:** The Advisory Committee is the final authority with respect to accreditation actions of the Council. This committee consists of public members from outside the field of Montessori education who are selected by the Board of Directors. The Advisory Committee functions as an autonomous Council body to finally review both the recommendations of the review committees and the process by which they were reached.

(b) **Board of Directors:** The Board of Directors has full authority to manage and direct the general business and affairs of the Council consistent with and under the provisions and qualifications stated in the "Articles of Association". The Board of Directors consists of individual representatives designated by each of the collaborating organizations and a specified voting representation from the body of Program Delegates. Significant duties of the Board of Directors include:

- (1) Assess and collect Council fees;
- (2) Approve and publish Council information;
- (3) Delegate authority by appointment of committees and designation of officers;

- (4) Interpret, enforce and implement the Articles of Association;
- (5) Select members of Advisory Committee;
- (6) Review Council policies and procedures to improve the operation and efficiency of accreditation activity.

(c) **Program Delegates:** The body of Program Delegates consists of individual representatives of all those sponsoring institutions which conduct programs holding current accredited status with the Council. These representatives are entitled to one vote each on all matters which properly come before the Program Delegates.

3. Collaborating Organizations:

Collaborating organizations are qualified national or international Montessori organizations which participate in Council accreditation procedures through their appointed review committees. Specific duties of a collaborating organization include:

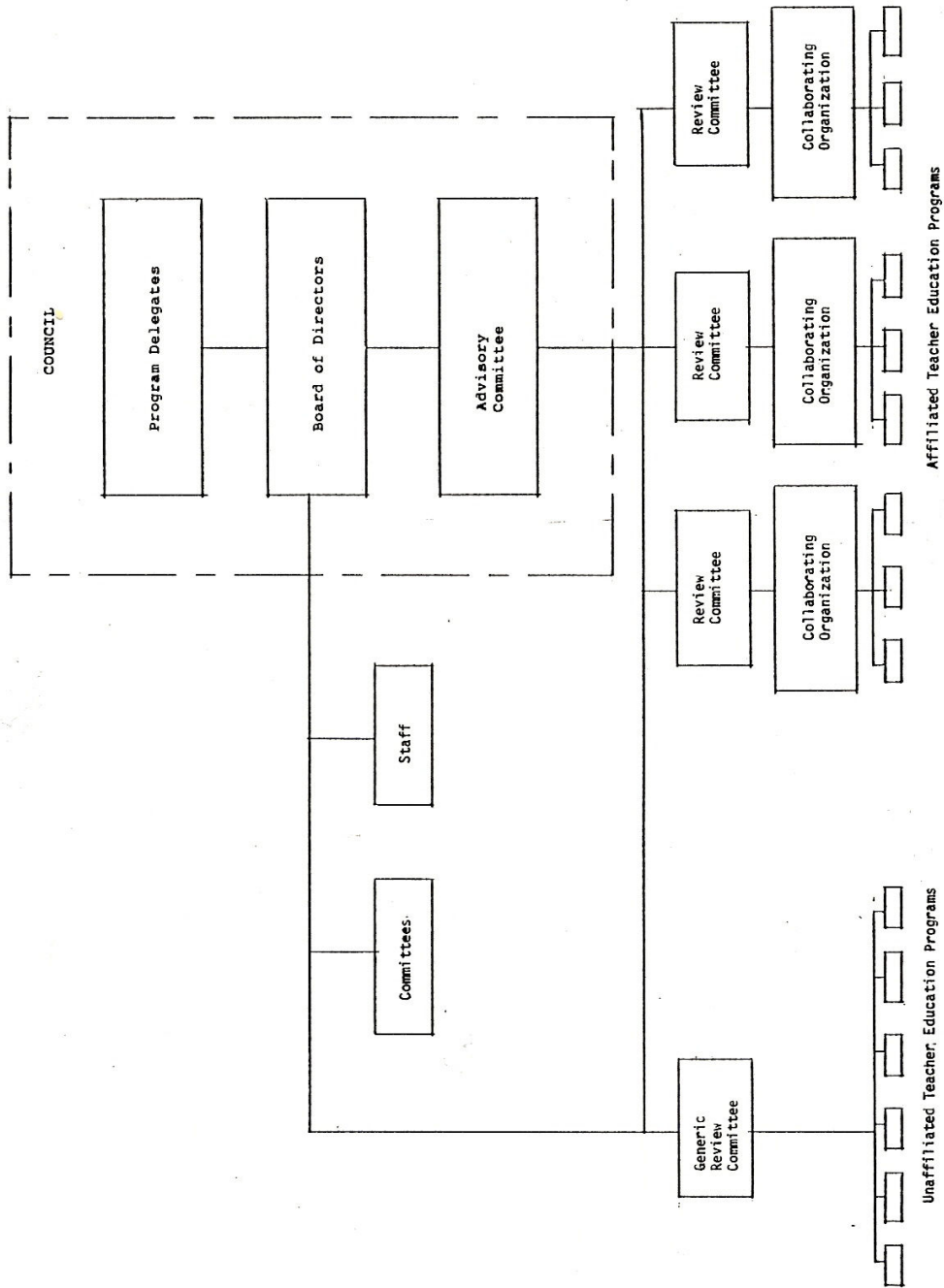
- (a) Designates its representative to serve on the Council Board of Directors;
- (b) Appoints qualified personnel to its review committee and assures regularly scheduled meetings;
- (c) Adopts accreditation standards, Essentials and specific Criteria, to evaluate its affiliated Montessori teacher education programs.

4. Review Committees:

Review committees are vested with the responsibility and authority to evaluate programs after the sponsoring institution of an applicant program has requested accreditation review. These committees evaluate the applicant programs for compliance with their specific standards and criteria primarily by analyzing *Self-Study Reports* and sending well-qualified representative teams to conduct follow up on-site visits to verify data provided on these reports. After carefully considering all relevant materials in this review process, they develop an accreditation recommendation for the Council's Advisory Committee.

Members of review committees are appointed by their respective collaborating organizations. A separate *Generic Review Committee* is established by the Council's Board of Directors to evaluate programs independent and unaffiliated with any collaborating organization.

Organizational Chart of Council



SUMMARY OF STEPS TO ACCREDITATION

1. Inquiry

Upon initial inquiry from a program or interested person seeking accreditation, the Council promptly responds by sending the "Council Accreditation Handbook" and application form.

2. Application for Accreditation

The program submits to the Council a completed application form and application fee for accreditation by the Council, indicating the specific review committee whose standards and procedures will be applied.

3. Council Response

The Council staff refers the program's application to the designated review committee for its further action and procedures. The program is directly informed by the Council staff of its referral.

4. Review Committee Response

The designated review committee provides the program with its own particular Essentials and Criteria and related Guidelines (if any), together with information relating to its specific accreditation review procedures. This response also includes the provision of specific guidance in the preparation of a Self-Study Report.

5. Self-Study Report

The program's Self-Study Report is a documented written account of the program's own evaluation of program outcomes and operation necessary to indicate substantial compliance with the *Essentials and Criteria*. Specific format and content is set forth in accordance with review committee guidance and direction. The Self-Study Report is examined by the review committee for its completeness and potential for eventual accreditation. Based on a favorable examination of the Self-Study Report, the review committee schedules an on-site evaluation team visit.

6. On-Site Evaluation Team Visit

A volunteer team of individuals knowledgeable about education and Montessori teaching is designated and assembled by the review committee to evaluate the program relative to its Self-Study Report and the applicable *Essentials and Criteria*. Using a format specified by the review committee, the On-Site Evaluation Team visits the program on-site and prepares a written Site Visit Report that is submitted to the review committee and to the program under evaluation.

7. Program Response

The program is given a specified period of time to submit written comment and correction of factual errors or conclusions to the review committee. The written response is added to the Site Visit Report, with copies sent by the review committee to the On-Site Evaluation Team within a specified period of time before review committee action.

8. Review Committee Action

After consideration of the application, the Self-Study Report, the Site Visit Report and other related documentation, the review committee formulates an accreditation recommendation and refers it to the Council.

9. Council Accreditation

The Council's Advisory Committee examines the recommendation of the review committee for consistency and clarity in relation to the applicable *Essentials and Criteria*. The review committee's recommendation may be accepted, modified or referred back to the review committee with instructions 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.

REVIEW COMMITTEES

Review committees are organized by organizations collaborating with the Council. They conduct specific self-study and site visit procedures which are applied with reference to the applicable *Essentials and Criteria* and related *Guidelines* (if any). The *Essentials* are those minimum standards by which all review committees examine, survey and evaluate programs for purposes of accreditation. *Criteria* are uniquely required by each review committee to define, comple-

ment and clarify the *Essentials*. The *Guidelines* are explanatory statements, examples or illustrations which clarify how the *Essentials and Criteria* are interpreted.

Programs seeking accreditation in affiliation with one of the Council's collaborating organizations must use that organization's own review committee for purposes of Council accreditation. Programs seeking an unaffiliated accreditation status with the Council use the Council's own "Generic Review Committee". The program's selection of a specific review committee is made on the application form for accreditation which is initially submitted to the Council. Contact the particular review committee for information and details concerning specific standards, policies and procedures employed in their accreditation activities:

[List of Review Committees]

Accreditation Handbook — Appendix C

MAINTAINING AND ADMINISTERING ACCREDITATION

A. Program/Sponsoring Institution Responsibilities

1. Applying for Accreditation

The accreditation review process conducted by the agency *International Montessori Accreditation Council* can be initiated only at the written request of the chief executive officer or an officially designated representative of the sponsoring institution.

This process is initiated by requesting an application form from and returning it to:

International Montessori Accreditation Council

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

Review committees may request additional application materials prior to guiding the program through completion of a self-study and preparation of a Self-Study Report.

A program or sponsoring institution may at any time prior to the final accreditation action withdraw its request for initial or continuing accreditation.

2. Administrative Requirements for Maintaining Accreditation

Programs are required to comply with 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 review committee.
- (b) Agreeing to a reasonable site visit date before the end of the period for which accreditation was awarded.

- (c) Informing the review committee within a reasonable period of time of changes in program personnel as required by the **Essentials and Criteria**.
- (d) Paying Council and review committee accreditation fees within a reasonable period of time, as determined by the Council or review committee.
- (e) Completing and returning by the established deadline the Annual Report provided by the Council.

Failure to meet these administrative requirements for maintaining accreditation may lead to being placed on Administrative Probation and ultimately to having accreditation withdrawn.

B. Council/Review Committee Responsibilities

1. Administering the Accreditation Review Process

At the written request of the chief executive officer or an officially designated representative of the sponsoring institution of the program, the Council and the appropriate review committee examine the program to assess compliance with the **Essentials and Criteria**.

The accreditation review process includes a site visit. If the performance of a site visit team is unacceptable, the sponsoring institution may request a second site visit.

Before the review committee forwards its recommendation to the Council, the sponsoring institution is given an opportunity to comment on the report of the site visit team and to correct factual errors.

Prior to recommending **Probationary Accreditation** to the Council, the review committee provides the sponsoring institution with an opportunity to respond to the cited deficiencies. Review committee reconsideration of a recommendation for **Probationary Accreditation** is made on the basis of conditions existing when the review committee arrived at its accreditation recommendation to the Council and on subsequent documented evidence of corrected deficiencies.

Council assignments of **Probationary Accreditation**, including those following review committee reconsideration, are final and are not eligible for further appeal.

2. Withholding or Withdrawing Accreditation

Prior to recommending **Accreditation Withheld** or **Accreditation Withdrawn** to the Council, the review committee provides the sponsoring institution with an opportunity to request reconsideration. Council decisions to withhold or withdraw accreditation are final unless appealed to the Council. A copy of the Council's Appeals Procedures for **Accreditation Withheld** or **Withdrawn** is included in the letter notifying the sponsoring institution of one of these actions.

When accreditation is withdrawn, 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**.

All students successfully completing a program granted any accreditation category at any point during their enrollment as students are regarded as graduates of a Council-accredited program.

3. Inactive Programs

The sponsoring institution may request inactive status for a program that has no enrolled students for up to two years. Such programs must continue to pay annual fees to the Council. After being inactive for two years, the program will be considered as discontinued, and accreditation may be withdrawn.

APPENDIX A

ESSENTIALS AND CRITERIA

FOR ACCREDITATION OF AN EDUCATIONAL PROGRAM FOR THE PREPARATION OF MONTESSORI TEACHERS

Adopted by the Agency

INTERNATIONAL MONTESSORI ACCREDITATION COUNCIL
9525 Georgia Ave. #200
Silver Spring, MD 20910
USA
Tel. 301-589-1127

Essentials are the minimum standards for accrediting educational programs that prepare individuals to enter the profession of Montessori teach recognized by the agency “International Montessori Accreditation Council”. The extent to which a program complies with these standards determines its accreditation status; the *Essentials* therefore include all requirements for which an accredited program is held accountable. *Essentials* are printed in bold-faced type in outline form.

These standards are to be used for the development and self-evaluation of Montessori teacher education programs. Site visit teams assist in the evaluation of a program’s compliance with the *Essentials*. Lists of accredited programs are published for the information of students, employers and the public.

Criteria are identified by each collaborating organization as specific definitions of the acceptable ways in which its affiliated programs seeking accreditation must meet the *Essentials*. For the Generic Review Committee, specific *Criteria* are identified by the Council and applied to unaffiliated programs seeking this particular avenue of accreditation. *Criteria* may be stated in mandatory terms to the extent that they are complementary and not inconsistent with the quotation of an *Essential* standard; they are used by all constituents involved in the particular review committee’s accreditation process.

Guidelines may be established and employed by each review committee to provide examples of how general statements in the *Essentials or Criteria* may be interpreted. *Guidelines* are considered illustrative rather than mandatory; they are intended to assist programs in complying with the *Essentials and Criteria*. Because *Guidelines* are illustrative rather than mandatory, they are stated in permissive terms, as indicated in the auxiliary verbs “should”, “may”, and “could”. It is possible to have “shall”, “must” and “will” in the *Guidelines* if they are within the quotation of an *Essential or Criteria*.

Criteria are included in this document in ordinary face type as suggestions for possible adoption by the pertinent review committees. Specific *Criteria* and *Guidelines* for the Generic Review Committee are based on these suggestions to be employed with programs seeking accreditation outside of affiliation with a specific collaborating organization.

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 might include:

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

I. Sponsorship

A. The sponsoring institution must be clearly identified and described in writing. In programs provided by two or more institutions, responsibility 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 might include: Requirement for provision of specific written documentation, such as copy of official legal operating instrument, bylaws, institutional recognition by private or public agencies. Specification of major components of documentation, including provision for periodic review.

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

Criteria might include: Specified postsecondary scope of operation, institutional recognition/accreditation, arrangement with specific institutional entities, such as specified colleges, schools or other organization.

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 might include: Requirements for clearly defined goals and objectives which are reasonably related and consistent with program purpose.

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 might include: Factors to be considered in ascertaining a desirable student capacity, such as type and amount of equipment and space; variety and type of instruction and procedures; and the availability of instructors and other supervisory personnel.

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 might include: Statement defining function and responsibility for all pertinent aspects of institutional administration (e.g., organizational chart).

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 might include: Statements that adequate clerical and other administrative support staff should be available; statement that program director shall have sufficient pertinent business and educational experience, knowledge and skill to perform assigned responsibility; suggestion that institutions have written job description/requirements for program director and other administrative officials.

3. Instructional Staff

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

Criteria might include: Statement of specific skills and qualifications (e.g., mature, professional attitude, responsible, specific experience, academic preparation).

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 might include: An indication of the kinds of continued education and other opportunities that could assist program officials/faculty in maintaining and upgrading their professional and instructional abilities.

C. Financial Resources

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

Criteria might include: A written financial statement or budget shall be periodically prepared and provided giving a clear and accurate picture of the program's financial status. The financial records should be kept in such a form that the economic status of the sponsoring institution may be readily determined.

D. Physical Resources

Adequate facilities, equipment and learning resources shall be provided.

Criteria might include: Instructional aids, reference and demonstration materials must be provided when required by the types of learning experiences delineated in the curriculum. Adequate instructional space shall be provided for program which hold on-site academic and/or practice sessions including an actual model classroom which exemplifies suitable physical conditions for the child age range(s) of the program. Office space for program personnel provides adequately for storing records and materials, preparing instructional materials, consultation with students and in general enabling program personnel to function effectively and efficiently. All spaces are 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 specifies how space requirements are met and responsibility is assigned.

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.**
- 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 might include: Statement that the sponsoring institution must present learning experiences through specific time frames, format or methodology; a minimum length for the program, or its specific components; informing the sponsoring institution that the credential, diploma or certificate documenting completion of the program should be consistent with awards given for other similar programs; guidance regarding keeping records of curricula, program syllabi, evaluation procedures, practice teaching content and schedules, etc.; references to advance placement and credit for prior education and/or experience.

IV. Students

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.

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 might include: Requirement that program officials are responsible for establishing a procedure for determining that the applicants' or students' physical health, communication skills and basic intellectual capacity is sufficient to reasonably assure their satisfactory completion of all program requirements and to function as an effective Montessori teacher.

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 might include: An indication that a document of completion (e.g., certificate, diploma, credential, etc.) shall be issued to students only when all program requirements have been fully met. The document of completion shall specify the name of the issuing institution, date document issued, name of recipient, brief description of program content completed and any other material facts to distinguish and otherwise identify the document.

D. Guidance

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

Criteria might include: Informing students of procedures for resolving grievances and unfavorable evaluations. Requirement that grievance procedures and policies are equitable, comprehensive and offer timely resolution.

V. Operational Policies

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 might include: Published material and recruiting personnel make only justifiable and provable 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 practical service work while enrolled in the program must be published and made known to all concerned; requirement that attendance and absences are recorded, minimum levels defined and that policies for make-up work are reasonable and published and have a direct relationship to content missed; suggestions for retention policy may be specifically stated; e.g., repeated failure to complete required assignments and attend classroom instructional periods of time, failure to meet minimum attendance requirements, failure to make tuition payments when due; systems of grading or evaluation of progress are clearly defined and communicated; guidance about what might be included in printed program material; e.g., purpose/objectives of the sponsoring institution, general certificate requirements, name, address and telephone number, if any, of the sponsoring institution, brief description of the curriculum and schedule, names and academic background of the faculty, tuition and fees, admission procedures and requirements, name of owner or governing body of sponsoring institution, and any other material facts about the sponsoring institution and program as are likely to affect the decision of students to enroll; requirement that status with the Council and other agencies is appropriately published.

B. Student Records

Satisfactory records shall be maintained for student admission, participation and evaluation. Evidence of program completion by gradu-

ates shall be maintained by the sponsoring institution for a reasonable period of time after graduation.

Criteria might include: Program should provide for permanence of retaining student completion documents and related evidence of participation in the event that the program and/or sponsoring institution shall discontinue operation.

VI. 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 might include: A recommendation that program evaluation should include a continuing system for internal and external curriculum validation, including evaluation by current and former students; follow-up studies of alumni, such as employment and examination performance; and input from various groups, such as admission, curriculum and advisory committees.

ESSENTIALS AND CRITERIA FOR THE GENERIC REVIEW COMMITTEE

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

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.

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.

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.

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.

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.

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

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.

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.*]

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.

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

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 enroll-

ment 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.*]

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.

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

Articles of Association

OF THE AGENCY INTERNATIONAL MONTESSORI ACCREDITATION COUNCIL

ARTICLE I NAME

The name of the association is "International Montessori Accreditation Council" (herein and otherwise also referred to as "Council" or "IMAC")

ARTICLE II PURPOSE

The purpose of the Council is to provide accreditation to improve the quality of Montessori teacher education programs by:

- i. Creating goals and standards for program improvement;
- ii. Assisting prospective students, employers and other interested persons in the identification of acceptable educational programs;
- iii. Providing recognition for Montessori teacher education programs which meet specified standards;
- iv. Providing a more unified and dignified presentation of Montessori education to the world; and
- v. Offering a basis for the fair and impartial determination of eligibility for government financial assistance to accredited programs.

ARTICLE III MEMBERSHIP

Membership in the Council shall consist of two categories: (1) Program Delegates and (2) Collaborating Organizations.

Section 1. Program Delegates

Each sponsoring institution of a Montessori teacher education program having current accredited status in good standing with the Council shall designate its representative to serve as a Program Delegate entitled to one vote on all matters submitted to vote of such Program Delegates. The primary purpose of the Program Delegates shall be to provide liaison and consultation di-

rectly with the accredited programs. Without prejudice to their consultative and liaison purpose, specific powers of the Program Delegates shall be to offer advice and consent as to: (1) Amendment to these Articles of Association; (2) Revisions to Council's Statement of Basic Accreditation Principles and accreditation standards known as *Essentials*; and (3) Council accreditation fees other than those charged directly with respect to accreditation activities conducted by the review committees. In addition, Program Delegates may vote for representation on the Board of Directors as set forth herein.

Voting on all matters before the Program Delegates shall be by majority of those duly recognized and casting ballots. The Council shall make provision for appropriate notice and opportunity to vote with respect to all pertinent issues arising before the Program Delegates.

Section 2. Collaborating Organizations

Any duly qualified national or international Montessori organization may participate as a collaborating organization with the Council. A Montessori organization is qualified as a collaborating organization if it:

- i. Offers standardized Montessori teacher education program content and format for the purpose of affiliation with separate legal entities to conduct all or any substantial portion of its teacher education activity;
- ii. Adopts Council accreditation standards (i.e., *Essentials*) and publishes and employs its own *Criteria* which are not in conflict with such Council *Essentials*;
- iii. Ratifies and complies with the Council accreditation policies and procedures for accreditation of all its affiliated Montessori teacher education programs as set forth in the Council's "Statement of Basic Accreditation Principles"; which statement is hereby expressly incorporated by reference into these Articles of Association.
- iv. Complies with all pertinent financial and legal commitments to the Council as set forth by pertinent Council decisions and these Articles of Association.

Collaborating organizations engage in program accreditation in accordance with the terms, conditions and procedures set forth in these Articles of Association, the Council "Statement of Basic Accreditation Principles", applicable Council accreditation *Essentials and Criteria* and such other documents and instruments as the Council may from time to time promulgate or publish. Without prejudice to the provided powers, duties and responsibilities set forth elsewhere in pertinent Council documents, it is hereby expressly declared that the collaborating organization shall have the following functions: (1) to appoint a representative to the Council Board of Directors; (2) to appoint members to constitute its review committee which is recognized by the Council to conduct pertinent accreditation activities in accordance with applicable *Essentials and Criteria*; and (3) to otherwise collaborate and function in applicable Council accreditation activities as shall be incidental and reasonably related to the purpose and requirements of the Council as generally set forth in the Council's "Statement of Basic Accreditation Principles".

Section 3. Removal and Withdrawal

Program Delegates are removed or withdrawn by their respective sponsoring institution or by operation of change in the sponsoring institution's status as to accreditation. Collaborating organizations may be involuntarily removed from the Council for failure to comply with lawful and required duties and responsibilities in accordance with provisions herein specified under Article VIII, "Controversies and Disputes", and not otherwise. Collaborating organizations may voluntarily withdraw from the Council at any time for any reason with ninety (90) days written notice. It is agreed by collaborating organizations and the Council that removal or withdrawal will not be consummated so as to unreasonably prejudice or disqualify students in existing accredited, affiliated programs from the benefits of such association with the Council. Upon such withdrawal or removal, the accredited status of affiliated educational programs qualified by accreditation through their respective collaborating organization shall be revoked, notwithstanding the exercise of due care with regard to unreasonable prejudice to students in existing educational programs at the time of such removal or withdrawal as provided by this section. The removal or withdrawal shall not prejudice the rights of affiliated educational programs from renewing accreditation by re-applying for accreditation as an unaffiliated program or through affiliation with another collaborating organization.

ARTICLE IV BOARD OF DIRECTORS

Section 1. General Powers

The business and affairs of the Council shall be managed by its Board of Directors. Without prejudice to general managerial powers conferred on the Board of Directors which are otherwise appropriate and proper to its essential function, it is hereby expressly declared that the Board of Directors shall have the following powers which shall be exercised in a manner consistent with the Council's purpose stated herein:

- i. To set and receive Council fees and otherwise maintain revenue and pay bills of the Council;
- ii. Approve and publish Council information;
- iii. Delegate and otherwise organize its authority through such means as appointment of committees, election of committee members, designation or election of officers and employment of Council staff;
- iv. Select qualified members (preferably at least three (3) in number) to serve on the Generic Review Committee; and to otherwise monitor and sustain the effective accreditation activities of this committee;
- v. Interpret, enforce and implement these Articles of Association and all pertinent Council decisions, policies and procedures;
- vi. Select members of the Advisory Committee to function autonomously as the final decision-making authority with respect to all Council accreditation actions;
- vii. Review Council policies and procedures to improve the operation and efficiency of accreditation activity;

- viii. Exercise all other necessary powers and functions in the United States and all other countries throughout the world as are incidental or reasonably related to the Council's purpose, subject to the terms and conditions herein stated.

Section 2. Number, Tenure and Qualification

The Board of Directors shall consist of one (1) representative designated by each collaborating organization and further representation designated from among the duly qualified Program Delegates as follows:

- i. One (1) representative each from those Program Delegates representing accredited programs affiliated with each collaborating organization.
- ii. One (1) representative from all those Program Delegates representing accredited programs affiliated with no collaborating organization.

Accredited programs affiliated with each collaborating organization for purposes of this voting representation shall include any such program which is operated directly by the collaborating organization itself.

Board members representing the collaborating organization shall be identified and designated as such in writing by the collaborating organization and shall serve in that capacity until further written notice by the collaborating organization or until otherwise properly removed or vacated by pertinent Council action.

Board members designated by Program Delegates affiliated with collaborating organizations shall be determined by majority of ballots cast by such Program Delegates for such terms as are set forth under procedures established and conducted by the pertinent collaborating organization. Board members designated by Program Delegates for programs affiliated with no collaborating organization shall be determined annually by majority of ballots cast by such Program Delegates according to procedures established and conducted by the Council's Board of Directors.

There shall be available to the Program Delegates reasonable nomination and election procedures for their pertinent Board member, which nomination and election procedures shall be established by the collaborating organization or the Council Board of Directors, as the case may be. The procedures shall include:

- i. A reasonable means of nominating persons for election as Board members.
- ii. A reasonable opportunity for a nominee to communicate to the pertinent Program Delegates the nominee's qualifications and the reasons for the nominee's candidacy.
- iii. A reasonable opportunity for all nominees to solicit votes.
- iv. A reasonable opportunity for all Program Delegates to choose among the nominees.
- v. If no ballots are cast in accordance with these election procedures, the applicable collaborating organization may designate pertinent representation for its affiliated programs. For purposes of identifying and qualifying all Board members representing the Program Delegates, the Council shall assume that any prior designated or elected Board member shall continue in that capacity as before until further no-

tice is given to the Council by the pertinent collaborating organization. Otherwise, the Council may declare as "vacant" the applicable Board membership.

For purposes of qualifying voting by Program Delegates for their applicable Board member, the Council records of accredited programs at a date specified by the pertinent collaborating organization or Board of Directors; as the case may be; not to exceed ninety (90) days before the date of the election of such Board member, shall be employed. If no such record date is specified, the date for determining Program Delegates qualified to vote shall be the date of the particular election for which such qualification applies.

Section 3. Regular Meetings

A chairperson shall be elected by a majority vote of the Board of Directors and shall serve for a one-year renewable term or as otherwise provided by the Board. The chairperson shall function to call and conduct all regular meetings of the Board of Directors. In the event of absence or disability of the chairperson, the Board shall appoint another Board member to serve as temporary chairperson for such meeting. A regular meeting of the Board shall be held at least annually to consider reports of the affairs of the Council and to transact such other business as may properly be brought before the meeting.

Section 4. Special Meetings

Special meetings of the Board of Directors for any proper purpose or purposes may be called at any time at the discretion of the chairperson of the Board or upon the written request of a majority of the Board. Special meetings of the Board for the purpose of removal of Board members and election of their replacements may be called by ten per cent (10%) or more of the Board members in accordance with procedures set forth elsewhere herein under Article VIII, "Controversies and Disputes".

Section 5. Place of Meeting

The person or persons authorized to call a meeting may fix the time and place for holding such meeting with proper notice to all Board members; provided, however, that such meeting shall be within a radius of thirty (30) miles from the principal offices of the Council unless agreed to in advance otherwise by a majority vote of the entire Board of Directors then in office.

Section 6. Notice

Written notice of all meetings shall be given to all Board members, stating the place, date and time of the meeting, and unless it is a regular meeting, indicating that it is being issued by or at the direction of the person calling the meeting. The notice shall state the purpose of the meeting and the business to be transacted. If action is proposed to be taken at any meeting to: (1) elect chairperson of the Board (2) remove Board member(s) (3) fill vacancies on the Board (4) adopt amendments to Council operating instruments; i.e., Articles of Association, "Statement of Basic Accreditation Principles", or the *Essentials* (5) revise standard Council fees or (6) voluntarily wind up and dissolve the Council, the notice shall so indicate and state the general nature of such proposal. If an amendment or other revision of these Articles of Association regulating an impending election or appointment to the Board of Directors is adopted by the Council, the notice of the next meeting for election or appointment to the Board of Directors shall set forth the pertinent changes.

Notice of any meeting of the Board of Directors shall be given not less than twenty (20) days or more than sixty (60) days before the date of the meeting to each Board member who, on the record date for notice of the meeting, is entitled to vote at such meeting. Notice of the meeting shall be given either personally or by first-class mail or other means to assure prompt written communication, addressed to the Board member at the address of such member shown by the then current records of the Council. If mailed, such notice shall be deemed to be delivered when deposited with the post office in a sealed envelope so addressed, with first-class postage thereon prepaid. Board members residing outside the continent from which such notice is mailed shall be given any special consideration necessary to assure a prompt notice and reasonable opportunity for their attendance. Certificate of timely mailing with first-class postage thereon prepaid shall be prima facie evidence of the giving of such notice.

If any notice or report addressed to a Board member at the address of the Board member shown on the current records of the Council is returned to the Council by the postal service to indicate that the postal service is unable to deliver the notice or report to the Board member at such address, further reasonable efforts shall be promptly taken by telephone or otherwise to provide the indicated timely notice and obtain proper mailing address for further regular communication. Thereafter, upon failure of these further efforts to achieve communication, all future notices or reports shall be deemed to have been duly given without further mailings if the same shall be available for the Board member upon written demand of the Board member at the principal offices of the Council for a period of one (1) year from the date of the giving of the notice or report to all other Board members.

If a properly called meeting is adjourned to another time or place within twenty-four (24) hours of such original meeting time and place, and, if any announcement of the adjourned time or place is made at such meeting, it shall be necessary to give further notice of the adjourned meeting to Board members not present at the time of the announcement only to the extent which is reasonable under the circumstances. It shall not be necessary to give further notice of the adjourned meeting to those Board members who were not present at any part of the original meeting. At the adjourned meeting the Board may transact any business which might have been properly transacted at the original meeting.

Section 7. Consent to Meetings

The transactions of any Board meetings, however called and noticed, and wherever held, are as valid as though had at a meeting duly held after regular call and notice, if a quorum is present either in person or by proxy, and if, either before or after the meeting, each of the persons entitled to vote, not present in person or by proxy, signs a written waiver of notice or a consent to the holding of the meeting or an approval of the minutes thereof. All such waivers, consents and approvals shall be filed with the Council records and/or made a part of the minutes of the meeting. Attendance of a person at a meeting shall constitute a waiver of notice of and presence at such meeting, except when the person objects, at the beginning of the meeting, to the transaction of any business because the meeting is not lawfully called or convened and except that attendance at a meeting is not a waiver of any right to object to the consideration of matters not included in the notice if such objection is expressly made at the meeting.

Section 8. Quorum

A majority of the voting power, represented in person, by written ballot, or by proxy shall constitute a quorum at the meeting of the Board of Directors, provided that if less than such a majority of the Board are present at said meeting, a majority of the Board members present may adjourn

the meeting without further notice. Vacant or removed Board members are not counted for purposes of determining a quorum.

Section 9. Manner of Acting

If a quorum is present, the affirmative vote of the majority of the voting power represented at the meeting, entitled to vote, and voting on any matter shall be the act of the Board of Directors, except as otherwise may be specifically provided in these Articles of Association. Consensus of all Board members shall be deemed the preferred manner of acting on all issues arising for vote by the Board. Vacant or removed Board members have no voting power. A consensus of all Board members then in office is necessary for amendments to these Articles of Association and revision of Council *Essentials* or its "Statement of Basic Accreditation Principles".

Section 10. Voting Rights

Voting by the Board of Directors shall be by majority of those votes represented as present and voting; provided that one individual Board member may represent no more than two (2) such votes. Vacant or removed Board members have no voting rights or power.

Section 11. Proxy Representation

There shall be no proxy representation given to another Board member for purposes of their voting except as provided herein. Any proxy representation shall be limited to written voting instructions or ballot with respect to specific issues or elections. Every such proxy representation must be signed by the Board member and shall be valid for voting only at the next meeting held thereafter. Every such proxy representation shall be revocable in writing at the pleasure of the member executing it. A proxy representation is not revoked by the death or incapacity of the maker or terminated as a result thereof unless, before the vote is counted, written notice of such death or incapacity is received by the Council. The proxy representation of a Board member may not be irrevocable.

All proxy representations shall be exercised on behalf of the Board member executing it by the Board chairperson or inspectors of voting, as the case may be, and counted in the total of ballots cast only as to the matter which is the subject of such representation. Any proxy representation marked in a manner indicating that the authority to vote is to "abstain" or "withhold" shall not be a vote either for or against, but shall nonetheless be counted as part of the total votes cast with respect to voting on the pertinent matter. No proxy representation shall be counted for purposes of meeting quorum requirements except as to voting on the matter specified by such representation.

Section 12. Record Date for Voting

In order that the Council may determine the Board members entitled to notice of any meeting or to vote or exercise any rights in respect of any other lawful action, the following applies:

- i. The record date for determining Board members entitled to notice of a Board meeting shall be the day on which the notice is sent or twenty (20) days before the meeting date, whichever is later.

- ii. The record date for determining Board members entitled to vote at a Board meeting shall be at the close of business on the business day next preceding the day on which the meeting is held.
- iii. The record date for determining Board members entitled to cast written ballots or otherwise to exercise rights without a formal meeting shall be on the day on which the written ballots or voting rights are mailed, actions taken, or solicited, whichever is first.

Section 13. Informal Action of Board by Unanimous Written Consent

Any action required or permitted to be taken by the Board may be taken without a meeting, if all members of the Board shall individually or collectively consent in writing to such action. Such written consent or consents shall be filed with the minutes of the proceedings of the Board. Such action by written consent shall have the same force and effect as a unanimous vote of the Board.

Section 14. Use of Conference Telephone

Members of the Board may participate in a meeting through use of conference telephone or similar communication equipment, so long as all members participating in such meetings can hear one another. Participation in a meeting pursuant to this Section 14 constitutes presence in person at such meetings.

Section 15. Notice of Adjournment

A majority of the Board members present, whether or not a quorum is present, may adjourn any meeting to another time and place within a period of less than twenty (20) days. If the meeting is adjourned for less than twenty-four (24) hours, notice shall be required as specified herein under Article IV, Section 6. If the meeting is adjourned for more than twenty-four (24) hours but less than twenty (20) days, reasonable notice of the adjournment to another time or place shall be given prior to the time of the adjourned meeting to the Board members who were not present at the time of the adjournment. At the adjourned meeting the Board may transact any business which might have been transacted at the original meeting.

Section 16. Inspection of Voting

In advance of any Board meeting, the Board may appoint an individual Board member or members to serve as inspectors of voting at the meeting. If such inspectors of voting are not so appointed, or if any persons so appointed fail to appear or refuse to act, the Board chairperson may, and on the request of any Board member or pertinent proxy representation shall, appoint inspectors of voting (persons to replace those who so fail or refuse) at the meeting. In the absence of any such appointment, the Board chairperson shall assume the function of such inspectors of voting. The number of inspectors shall be either one (1) or three (3) separate individual persons. If appointed at a meeting on the request of one (1) or more Board members or proxy representations, the majority of Board members represented in person or by proxy for this purpose shall determine whether one (1) or three (3) inspectors are to be appointed.

The inspectors of voting shall determine the number of voting members present and the voting power of each, the existence of a quorum and the authenticity, validity and effect of proxies, receive votes, ballots or consents, hear and determine all challenges and questions in any way

arising in connection with the right to vote, count and tabulate all votes and consents, determine when voting is completed, determine the results and do such acts as may be proper to conduct voting with fairness to all Board members.

The inspectors shall discharge their duties impartially, in good faith, to the best of their ability and as expeditiously as is practical. If there are three (3) inspectors of voting, the decision, act or certificate of a majority is effective in all respects as the decision, act or certificate of all. Any report or certificate made by the inspectors of voting is prima facie evidence of the facts stated therein.

Section 17. Vacancies

Any vacancy occurring on the Board among members representing collaborating organizations because of death, resignation, removal, disqualification or for any other reason except disqualification or removal from voting participation of the collaborating organization itself, shall be filled at the sole discretion and special action of the collaborating organization. Any such change of member representation by collaborating organizations shall be accepted by the Board only upon signed written authority of the collaborating organization which clearly identifies and designates the new Board member and which is duly received by and filed with the Council.

Any vacancy occurring on the Board from among those members representing Program Delegates as specified in Article IV, Section 2 because of death, resignation, removal, disqualification or for any other reason except for termination of the office itself with the Council, shall be filled according to a special vote of the pertinent Program Delegates or other action as determined by the applicable collaborating organization or, for unaffiliated Program Delegates, by the Board of Directors to fairly represent the voting interests of the affected Program Delegates during the unexpired term of the pertinent office.

Section 18. Compensation

Board members, as such, shall receive no financial compensation from the Council for their services or expenses incurred in attendance at any regular or special meetings of the Board; provided that nothing herein contained shall be construed to preclude any Board member from serving the Council in any other capacity and receiving compensation therefore. Nothing herein stated shall preclude collaborating organizations and Program Delegates from choosing to reimburse or otherwise compensate their Board member representatives for travel and other expenses and services on the Board if they wish.

Section 19. Executive and Other Committees

The Board may, by resolution adopted by a majority of all Board members then in office, designate two (2) or more Board members to constitute an Executive Committee which, to the extent provided in the resolution creating it in these Articles of Association, shall have all the authority of the Board, except with respect to: (1) approval of any action for which advice and consent of the Program Delegates is required; (2) the filling of vacancies on the Board or any committee designated by the Board; (3) the fixing of financial compensation of any Board member for service to the Council; (4) the amendment or repeal of these Articles of Association or the adoption of new Articles of Association; (5) revision of Council Essentials or its "Statement of Basic Accreditation Principles"; (6) the fixing of any Council accreditation fees other than those required for the proper conduct of accreditation by the Generic Review Com-

mittee with respect to the specific program under evaluation; or (7) the amendment or repeal of any resolution of the Board which by its express terms is not amendable or appealable.

The Executive Committee shall consist of the Board chairperson and at least one (1) other Board member with purpose to carry out the policies and affairs of the Council with the authority of the Board on all matters except as provided in these Articles of Association. The Advisory Committee and Generic Review Committee are hereby also established with members appointed by the Board as set forth herein under Article V. These committees and any other such standing or special committees as may be established by the Board shall have the powers and authority delegated to them by the Board as provided by these Articles of Association, except as to items (1) to (7) of the first paragraph of this Section. The Board, or if the Board does not act, the committees, shall establish whatever rules and procedures there may be for meetings and shall meet at such times as are deemed necessary or as required by these Articles of Association, provided that the quorum applicable to each committee shall be set forth for that committee by the Board. No act of a committee shall be valid unless approved by the vote or written consent of a majority of its members or as otherwise may be provided by these Articles of Association.

Section 20. Removal of Board Members

The Board shall declare vacant the office of a Board member representing any collaborating organization and its affiliated Program Directors when such collaborating organization has been duly removed from membership with the Council according to procedures and conditions set forth herein. Removal and replacement of Board members representing Program Delegates shall take effect otherwise according to the provisions set forth in Section 17 herein and elsewhere as specified in these Articles of Association.

Any Board member who fails to attend any regular or special Board meeting either in person or by proxy representation, or who fails to provide written notice of such non-attendance prior to such meeting, shall be promptly notified within seven (7) days after the meeting by the Board of such failure by first-class, certified mail, return receipt requested, or equivalent means to assure delivery and receipt of such notice. A copy of such notice shall also be sent at that time by first-class, certified mail, return receipt requested (or equivalent), to the applicable collaborating organization or unaffiliated Program Delegates, as the case may be. Such notice shall set forth the pertinent facts of such failure to comply with attendance requirements of Board members in this section, require a written explanation of such failure to be submitted to the Council within thirty (30) days from the date that the Board member received such notice, and indicate that unless such explanation is duly submitted, the Board member who is the subject of such action shall be deemed removed from the Board and the office declared vacant. If no such written explanation is received accordingly, the Board member shall be deemed removed and the office declared vacant, and the pertinent collaborating organization and/or Program Delegates will be so informed; provided however that recourse for such removal action may be had according to the procedures set forth herein under Article VIII, "Controversies and Disputes".

ARTICLE V

ACCREDITATION FUNCTION

Section 1. Procedures, Practices and Standards

The Council shall conduct its accreditation function for Montessori teacher education programs under the authority of and in compliance with the procedures and practices set forth in its "Statement of Basic Accreditation Principles" and the minimum educational standards set forth as the Essentials; such documents being hereby expressly incorporated with full force and effect into the operation of these Articles of Association.

Section 2. Advisory Committee

There shall be an Advisory Committee appointed by a consensus of the Board of Directors then in office to function autonomously as the final decision-making authority with respect to all Council accreditation actions as set forth in its "Statement of Basic Accreditation Principles" and in accordance with the Council's *Essentials* and pertinent review committee *Criteria* and *Guidelines*; provided however, that prior notice and opportunity to offer advise and consultation with regard to new committee appointments shall be afforded to all Program Delegates. All new appointments to the Advisory Committee shall be approved by consensus of Program Delegates affiliated with no collaborating organization, which consensus shall be assumed in the absence of any dissenting opinion to such appointments which is delivered in a timely manner to the Council. Any dissenting minority opinion to a pertinent appointment by Board members or Program Delegates unaffiliated with any collaborating organization shall be based on substantial cause and shall be offered in writing to all Board members within thirty (30) days of the pertinent voting. Such minority opinion shall include a statement of reason(s) and shall provide an alternative person willing and qualified to serve. Further voting for the appointment shall proceed as before through written ballot or otherwise to assure substantial fairness until an acceptable appointment is determined. Prior members of the Advisory Committee may continue to serve in such capacity on an interim basis pending the outcome of the pertinent appointment procedures.

Members of the Advisory Committee shall serve for renewable one-year terms without compensation, as such, with renewal of terms assumed in the absence of pertinent voting. Voting shall be required on one or more renewal appointments if so requested by at least one member of the Board of Directors. Such renewal voting shall then require a consensus approval of all Board members unless such voting might result in less than three (3) remaining members of the Advisory Committee, in which case a consensus vote against the renewal appointment shall be required, with corresponding appointment of new member as indicated in the first paragraph of this section. Membership shall preferably consist of at least three (3) who shall be appointed with regard to their interest in public service, geographical proximity to the other members of the committee and broad academic and educational experience outside the field of Montessori education. Individuals with previous accreditation experience and interest in Montessori education shall be preferred; provided however that no individual may be appointed who has graduated from or attended as a student any Montessori teacher education program, or who is or has been recently engaged as a paid employee of any Montessori teacher education program, Montessori organization or collaborating organization. Committee members may be removed for just cause, or may resign, and new appointment made in a manner consistent with their original appointment.

The Advisory Committee shall issue final accreditation decisions for the Council and shall have continuing oversight responsibility to maintain and assure the integrity of its accreditation decisions through such means as consideration of information on annual reports, findings, recommendations, and other information forwarded to it by the Council or otherwise properly obtained by the Advisory Committee. To this end, members of the Advisory Committee may participate in evaluation team visits and related program review, and offer suggestions and advice with regard to program evaluation and accreditation procedures.

The Advisory Committee shall meet at least annually to formally act on final accreditation decisions and such other matters as may properly come before the Committee. A chairperson shall be selected by the Committee by majority vote of the entire committee membership to serve for a renewable one-year term. Voting on all matters shall be by majority of all members of the Committee; it being understood that consensus through resolution of pertinent issues shall be encouraged and favored at all times. Quorum for such meetings shall be a majority of all Committee members.

Meetings of the Advisory Committee shall be called by the Board of Directors at the request of the Advisory Committee or when in the discretion of the Board, sufficient business is pending for action by the Committee. Agenda of meetings shall be determined by the chairperson of the Advisory Committee in consultation with the Board of Directors.

The Board shall specify the time and place for meetings of the Advisory Committee in consultation with the Committee chairperson and other committee members. Committee members shall be reimbursed for reasonable travel and lodging expenses, if any, when such meeting is beyond a radius of thirty (30) miles from the residence of such members. Notice of meetings and agenda shall be given to all Committee members, Board members and other interested parties at least ten (10) days prior to such meeting. Members of the Advisory Committee may participate in a meeting through use of a conference telephone or similar communication equipment, so long as all members participating in such a meeting can hear one another. Participation in such a meeting shall constitute presence in person at such meetings.

Any action required by the Council to be taken at a meeting of the Advisory Committee, or any action which may be taken at a meeting of the Committee, may be taken without a meeting if a consent in writing, setting forth the action so taken, shall be signed by all of the committee members and filed with the minutes of the proceedings of the Committee.

Section 3. Generic Review Committee

If there are programs affiliated with no collaborating organization accredited with the Council or seeking such unaffiliated accreditation status, there shall be a Generic Review Committee which shall have the function, duties and responsibilities of such as set forth in the Council's "Statement of Basic Accreditation Principles". The membership of the Generic Review Committee shall consist of qualified individuals (preferably at least three (3) in number) appointed by the Board of Directors by a consensus of all Board members then in office; provided however, that prior notice and opportunity to offer advice and consultation with regard to new committee appointments shall be afforded to all Program Delegates representing programs unaffiliated with any collaborating organization. All appointments to the Generic Review Committee shall be approved by consensus of such unaffiliated Program Delegates, which consensus shall be assumed in the absence of any dissenting opinion to such appointments which is properly received by the Council in a timely manner as herein set forth.

Any dissenting minority opinion to a pertinent appointment by Board members or unaffiliated Program Delegates shall be based on substantial cause and shall be offered in writing to all Board members within thirty (30) days of the pertinent appointment. Such minority opinion shall include a statement of reason(s) in support of such opinion and shall provide an alternative person willing and qualified to serve. Further voting for the appointment shall proceed as before through written ballot or otherwise to assure substantial fairness until an acceptable appointment is finally determined. Prior members of the Generic Review Committee may continue to serve in such capacity on an interim basis pending the outcome of the pertinent appointment.

There shall be preferred no more than one (1) member of the committee or equal representative membership on the Generic Review Committee (whichever is less other than zero) associated with each collaborating organization. For the purpose of this Section, "association" with a collaborating organization shall mean as an employee (i.e., faculty, staff, administrator) from a Montessori teacher education program affiliated with the collaborating organization or otherwise directly engaged in the management, administration or policy-making function of the collaborating organization.

A majority of the members of the Generic Review Committee shall be appointed for their experience and knowledge in the field of Montessori teacher education. All members of the committee shall be appointed with particular regard to their continuity, expertise and resources to provide timely and effective functioning of the committee. Members of the Generic Review Committee as such shall serve renewable one-year terms without compensation. Renewal of terms shall be assumed in the absence of pertinent voting. Voting shall be required on one or more renewal appointments if so requested by at least one member of the Board of Directors. Such renewal voting shall then require a consensus approval of all Board members unless such voting might result in less than three (3) remaining members of the Generic Review Committee in which case a consensus vote against the renewal appointment shall be required, with corresponding appointment of new member as indicated in the first paragraph of this section. Committee members may be removed for just cause, or may resign, and new appointment made in a manner consistent with their original appointment.

Meetings of the Generic Review Committee shall be called by the Board of Directors at the request of the Generic Review Committee or when in the discretion of the Board, sufficient business is pending for action by the committee. A chairperson shall be selected by the committee by majority of the entire committee membership to serve for a renewable one-year term. Voting on all accreditation matters shall be by majority of the entire membership then in office, it being understood that consensus through complete resolution of pertinent issues shall be encouraged and favored at all times. Quorum for such meetings shall be a majority of all committee members. Agenda of meetings shall be determined by the chairperson of the committee in consultation with the Board of Directors.

The Board shall specify the time and place for meetings of the Generic Review Committee in consultation with the committee chairperson and other members. Committee members shall be reimbursed for reasonable travel and lodging expenses, if any, when such meeting is beyond a radius of thirty (30) miles from the residence of such members. Such reimbursement may be charged to the applicable program or programs which are the subject of such meetings as part of their proper accreditation fees for this service. Notice of meetings and agenda shall be given to all committee members, Board members and other interested parties at least ten (10) days prior to the meeting. Members of the Generic Review Committee may participate in a meeting through use of a conference telephone or similar communication equipment, so long as all

members participating in such a meeting can hear one another. Participation in such a meeting shall constitute presence in person at such meetings.

Any action required by the Council to be taken at a meeting of the Generic Review Committee, or any action which may be taken at a meeting of the committee, may be taken without a meeting if a consent in writing, setting forth the action so taken, shall be signed by all of the committee members and filed with the minutes of the proceedings of the committee.

ARTICLE VI STANDARD OF CARE AND INDEMNIFICATION

Section 1. General Application

Any employee, or member of the Board of Directors, Advisory Committee, Generic Review Committee, and other such committees and agents of the Council shall perform one's duties in such capacity (a) in good faith; (b) in a manner one reasonably believes to be consistent with the proper requirements of Council operation; and (c) with the care that an ordinarily prudent person in a like position would use in such circumstances.

Section 2. Reliance on Information from Others

In performing one's duties, a member of any Council committee, Board, or other body, is entitled to rely on any information, report, or statement, prepared or presented by: (a) an officer, employee or other agent of the Council whom the member reasonably believes to be reliable and competent in the matters presented; (b) a lawyer, public accountant, or other person, as to a matter which the member reasonably believes to be within the person's professional or expert competence. A member is not acting in good faith if such member has any knowledge concerning the matter in question which would suggest or cause such reliance to be unwarranted.

Section 3. Presumption of Assent

A member of any Council committee, Board or other body who is present at a meeting of such committee at which action with respect to that committee is taken shall be presumed to have assented to the action taken unless the member's dissent or abstention shall be entered in the minutes of the meeting, or unless the member shall file a written dissent to such action with the person acting as chairperson or secretary of the meeting before the adjournment thereof, or shall forward the member's dissent by first-class, certified mail, return receipt requested (or equivalent), to such chairperson or secretary of the committee or body immediately after the adjournment of the meeting or promptly upon receipt of minutes of meeting at which the member's voting is believed to have been improperly recorded in such minutes. Such right to dissent shall not apply to a member who voted in favor of such action; provided, however, that all final accreditation decisions of the Advisory Committee shall be signed by all such committee members or otherwise effectively acknowledged in writing by each Advisory Committee member.

Section 4. Indemnification

Any employee of the Council, member of the Board of Directors, Advisory Committee or Generic Committee or other proper agent of the Council who performs one's duties on behalf of the Council in accordance with the standard provided in this Article shall be indemnified in any threatened, impending or completed action by or in the right of the Council by reason of the fact that such person is or was an agent of the council against expenses, judgments, fines, settlements, and other amounts actually or reasonably incurred in connection with such proceedings or action, unless, in the situation to which this Article applies, the action or matter in question is determined not to have been fair and reasonable to the council. This section shall not be construed to guarantee any monetary recovery or other compensation or indemnification to such agents from court action or other legal proceeding of non-Council parties which may arise from their involvement or association with Council, it being understood that Council indemnifies such agents against its own legal actions or other adverse proceedings by or on behalf of itself.

ARTICLE VII COUNCIL RECORDS AND REPORTS

Section 1. Records

The Council shall keep at the principle Council Offices:

- i. Adequate and correct books, records and accounts;
- ii. Minutes of the proceedings of the Board of Directors, Advisory Committee, Generic Review Committee and other committees of the Board; and shall send minutes of all such meetings to all Board members; and
- iii. A record of all accredited programs, Board members, collaborating organizations, Program Delegates, members of Council Committees and other committees associated with the Council giving their names and addresses.

Minutes shall be kept in written form. Other books and records shall be kept in written form or in any other form capable of being converted into written form. All books and records of the Council may be inspected by any Council member, Board member or his agent or attorney for any proper purpose at any reasonable time.

Section 2. Annual Statement

The Council shall annually file a statement containing:

- i. Income and expenses of Council operation during the past year, and current financial status of the Council;
- ii. the name and complete address, and representative title or capacity of the person completing the statement;
- iii. Street address of its principal office.

A copy of the annual statement shall be sent to all Board members.

Section 3. Checks, Drafts and Indebtedness

All checks, drafts and other orders for payment of money, notes or other evidences of indebtedness issued in the name or payable to the Council shall be signed and endorsed by such person or persons and in such manner as shall be determined from time to time by resolution of the Board of Directors.

Section 4. Deposits

All funds of the Council not otherwise employed shall be deposited from time to time to the credit of the Council in such banks, trust companies or other depository as may be selected by the Board of Directors.

Section 5. Contracts and Other Instruments

The Board of Directors may authorize any agent or officer(s) of the Council to enter into any contract or execute and deliver any instrument in the name of or on behalf of the Council, and such authority may be general or confined to specific instances, Unless so authorized by the Board of Directors, no officer, agent or employee shall have any power or authority to bind the Council by any contract or agreement, or to pledge its credit or to render it liable for any purpose or for any amount.

**ARTICLE VIII
CONTROVERSIES AND DISPUTES**

Section 1. Legal Construction

These Articles of Association are construed as a mutual covenant between and among the Board members in representation of their respective collaborating organizations and associated programs, to abide by all terms and conditions herein set forth, and to faithfully fulfill all applicable requirements and duties consistent with the purpose and objectives of the Council.

The Council is a completely separate legal entity from the collaborating organizations and Montessori teacher education programs accredited or seeking accreditation with the Council; it being understood that all such collaboration and accreditation is strictly voluntary and limited to specific accreditation purposes and procedures. No provision, power, duty, requirement or other condition specified in any Council document shall be construed to bind the Council together with either collaborating organizations or any Montessori teacher education program except in so far as reasonably required for proper accreditation procedures and operation of the Council as set forth in pertinent Council documents. Collaborating organizations and Montessori teacher education programs accredited with the Council or seeking such accreditation hereby indemnify and hold harmless the Council for damages or liability arising from their own separate organizational or programmatic activities or operation.

Section 2. Interpretation of Council Documents

The Board of Directors shall resolve all controversies and disputes with respect to the Article of Association and all Council procedures and practices by resolution or in such other manner as it shall reasonably determine according to relevant Council documents; provided however that the Advisory Committee shall resolve all controversies and disputes with the Advisory

Committee shall resolve all controversies and disputes with regard to program accreditation as the final decision-making authority with respect to such matters. All Council meetings shall be conducted according to customary parliamentary procedures (e.g., Robert's Rules of Order, current edition). Interpretation of Council documents including these Articles of Association shall be made with a liberal construction and reasonable meaning given to words so as to do substantial justice.

Section 3. Involuntary Removal of Collaborating Organization

A collaborating organization may be involuntarily removed from membership participation in the council for substantial failure to comply with requirement of the Articles of Association and other pertinent Council applied only with substantial cause and only in case of severe detriment to the Council's successful operation and shall be considered without prior notice of proposed removal action having been duly provided to all Board members, including those representing the subject organization and its affiliated programs.

Notice of a duly passed removal resolution shall be in writing and signed by all Board members voting for such resolution and shall set forth the specified deficiencies and grounds upon which such removal resolution to all Board members, including those Board members representing the subject organization and its affiliated programs. Removal of a collaborating organization under this Section will be set to take effect ninety (90) days from the date of such resolution. The notice under this section shall state the date of its effect and shall be sent to the collaborating organization which is the subject of such action and its affiliated accredited programs within fifteen (15) days after passage of the resolution by first-class, certified mail, return receipt requested (or such other equivalent means to assure delivery and receipt).

If prior to the expiration of the ninety (90) day period, a duly authorized representative of the collaborating organization files a written response to such removal resolution specifically refuting the grounds and alleged deficiencies upon which such removal is based, the removal resolution shall be held in abeyance pending the results of investigation, hearing procedures or other such subsequent actions held in accordance with the following:

(a) Investigation

Upon acceptance of the written response specified in this section, the Council's Board of Directors shall appoint a fair and impartial person or persons to investigate the matter and issues presented in the removal action based on information provided by the Council which support the grounds for removal. Upon appointment of investigator(s), the Council shall promptly notify the subject organization of such appointment and rights associated with such investigation procedures. The investigator(s) appointed shall not include any member of the Board of Directors or anyone who has recently served in any review procedures or program evaluation with respect to the subject organization. The purpose of such investigation shall be to identify the issues in contention, clarify and simplify the issues and verify areas of agreement as to facts. The investigator(s) shall have the right to meet informally with personnel of the subject organization or to call upon consultants and conduct interviews for the purpose of taking all relevant testimony. No investigator(s) shall be appointed over the express objection of the collaborating organization which is the subject of such investigation; provided however, that any such objection shall be offered in writing to all Board members within fifteen (15) days of receiving notice of the pertinent appointment,

stating the reason(s) for such objection and offering to provide an alternative person willing and qualified to serve within (30) days of the original appointment. If such alternative person is not provided within the specified time period, the original appointment shall be confirmed and the investigation shall proceed. If such an alternative person is provided by the collaborating organization for consideration through written ballot or otherwise to assure substantial fairness until a confirmed, acceptable appointment is finally determined.

(b) Hearing

The duly authorized official of the collaborating organization shall be entitled to request, within a term of twenty (20) days from its receipt of the notification of the confirmed appointment of the investigator(s), a hearing before the Council or its investigator(s) in order to offer whatever additional proof, or show cause why the action of removal shall not take effect. The Council shall set the date for the hearing and request attendance from among those persons who have made any adverse investigation of the subject organization or who otherwise can offer proof to uphold the allegation of deficiencies of the organization. The hearing will be presided over impartially by one of the investigators who shall hear both sides of the matter, including proof of facts, introduction of evidence and testimony of representatives of the subject organizations. The hearing shall apply due process procedures and practices as generally set forth in "Statement of Basic Accreditation Principles" with regard to appeals of decisions of the Advisory Committee.

The investigators shall compile and keep a written account of the investigation and testimony of the hearing and of any other pertinent documentation and information which may have been acquired during the investigation, and shall submit such account, together with a recommendation for action in the matter, to the Council within twenty (20) days after the date of such hearing. Based on such recommendation and written account, the pertinent members of the Board of Directors shall promptly reconsider the matter and upon majority vote of all Board members then in office or consensus of all Board members voting on the matter shall take the following action:

(1) Order Unconditional Membership Participation of the collaborating organization. In such case, notification of this action shall be promptly sent to the subject organization with a statement that such organization is in substantial satisfactory compliance with a Council requirements and full unconditional membership participation is thereby reinstated.

(2) Order Conditional Membership Participation of the collaborating organization, setting forth specific conditions or qualifications which must be met within a specified period of time. Notification of such order shall be promptly sent to the subject organization in writing by first-class, certified mail, return receipt requested, or equivalent means to assure delivery and receipt. The Board may extend the period for compliance with such conditions, if in its judgment, the conditions have been substantially met, or other circumstances are discovered which justify such extension. The subject organization may exercise its full rights to representation on the Board and other Council rights during the pendency of such conditional participation. If conditions specified herein are not met, the Board may order removal of the subject organization or otherwise act to recon-

sider or modify such conditions in accordance with the provisions of this section. Upon confirmation or completion of the stipulated conditions or qualifications in such order, due acknowledgment of full membership participation status shall be made by the Council in writing to the subject organization.

If the Board is unable to achieve a majority or consensus vote for action as to either paragraph (1) or (2) above, the prior removal resolution shall be reconsidered as previously set forth herein and further action taken accordingly; provided however, that any recommendation of the investigator(s) for reinstatement of the collaborating organization shall be final, binding and fully effective for this purpose among all parties concerned, and shall be unconditional, unless the Board orders otherwise as set forth above. Any reconsidered removal order shall be finally effective and binding on all parties within sixty (60) days of its final determination by the investigator(s) or at such longer period of time as may otherwise be reasonably set forth in the order; provided however, that no such reconsidered removal order shall be made without an affirmative recommendation for this order from the investigator(s). Notification of this reconsidered removal order with statement of any particular findings and conclusions in the relevant matter shall be in writing referenced to the original removal resolution and shall be promptly sent to the subject organization in due course in accordance with this Article. In all cases of a finally effective removal order, the Council shall endeavor to accommodate the reasonable needs and interests of affected students and programs as to their accreditation status with the Council.

Section 4. Involuntary Removal or Collaborating Organization for Failure of Attendance of Board Member

A collaborating organization may be involuntarily removed from membership participation with the Council due to removal of its Board member vacancy of its office by operation of Article IV, Section 20; provided however, that the provisions of this Article VIII, Section 4 are fully met. Upon vacancy of the office of a Board member representing a collaborating organization under Article IV, Section 20, the subject organization and all its affiliated accredited programs shall be notified within seven (7) days of the vacancy action that upon the expiration of ninety (90) days from the date of such notice, the collaborating organization shall be deemed removed from membership participation with the Council and all rights thereby removed, including the accreditation status of its affiliated programs provided however that if within such ninety (90) day period, the Council shall receive a written statement from the subject organization designating a qualified person to represent the subject organization on the Board of Directors, stating the organization's intention to assure proper participation of such Board member in the future, the removal notice shall be rescinded, and the collaborating organization so notified promptly in writing. All requirements or provisions for notices or communication submitted under this Section shall be deemed fully met by mail properly addressed and delivered to the post office in a sealed envelope with first-class postage prepaid, certified, on the date of delivery to the post office with return receipt requested, or other equivalent means to assure acknowledgement of receipts by the date which is the subject of such notice. If no written statement is received by the Council within ninety (90) day period indicated in this section, the collaborating organization which is the subject of this matter shall be thereby removed from membership participation with the Council.

Section 5. Effect of Removal of Collaborating Organization

Removal of a collaborating organization from membership participation with the Council shall likewise remove all its affiliated accredited programs from accreditation status with the Council in accordance with the “Statement of Basic Accreditation Procedures”. Nothing provided herein shall preclude a collaborating organization removed from Council membership from applying for membership participation with the Council in the future provided however that all pertinent qualifications are fully met.

ARTICLE IX DISSOLUTION AND TERMINATION

Section 1. General Provisions

The duration of the Council shall be perpetual or until such time as it is unanimously agreed by all Board members then in office, on specific written authorization of their respective collaborating organizations or unaffiliated programs, to terminate the Council; provided however, that any Board member may resign for any reason upon signed written notice of such action duly submitted to the Council, or upon being made vacant the office of such Board member, or by removal of the Board member, as the case may be. Upon resignation, the collaborating organization or Program Delegates which correspond to such Board member shall be promptly notified by the Council or otherwise to designate or elect a new Board member to replace its resigned Board member according to the provisions of these Articles of Association.

A collaborating organization may withdraw from the Council at any time for any reason upon proper written notice in accordance with the provisions of these Articles of Association. The Council shall continue its existence and proper accreditation function without interruption, except as to the withdrawn collaborating organization and its affiliated programs, which shall have accordingly terminated all rights and responsibilities therewith.

Section 2. Dissolution

To dissolve the Council, all collaborating organizations and all Board members representing programs unaffiliated with any collaborating organization, on written authorization from all such unaffiliated programs, shall unanimously agree. In such dissolution proceedings, the Board shall act through resolution and shall have the powers, duties and responsibility to properly wind up the affairs of the Council. If the Council dissolves:

- i. Every liability and obligation of the Council shall be paid and discharged or adequate payment and discharge shall be made;
- ii. Assets held by the Council subject to legally valid requirements for their return, transfer, or conveyance on dissolution shall be disposed of in accordance with these requirements;
- iii. Assets remaining with the Council after all liabilities, obligations and other requirements have been satisfied shall be distributed equally among the collaborating organizations then belonging to the Council, or otherwise equally to all unaf-

filiated accredited programs, unless otherwise unanimously agreed by the members of the Board of Directors.

ARTICLE X AMMENDMENTS

These Articles of Association and associated Council documents entitled "Statement of Basic Accreditation Principles" and the *Essentials* may be altered, amended or repealed and new Articles of Association, "Statement of Basic Accreditation Principles" or Essentials may be adopted only upon the affirmative consensus of all the Board members then in office and all the Program Delegates representing programs unaffiliated with any collaborating organization, with the advice and consent of program delegates of programs affiliated with the pertinent collaborating organizations. No vote on any amendment, repeal or other alteration of these Articles of Association shall be held by the Board or Program Delegates without a motion properly made and seconded on its behalf at a prior meeting of the Board of Directors. Upon such proper motion, all Board members and Program Delegates entitled to vote shall be notified in writing of the proposed amendment or other change to these Articles of Association or other pertinent Council documents at least thirty (30) days prior to any vote on the matter, specifying the proposed amendment with a brief explanation of the purpose and reason(s) for such action.

DECLARATION AND CERTIFICATION OF ADOPTION

The undersigned duly designated representatives of their respective collaborating organizations or affiliated programs, hereby assent to and adopt the foregoing Articles of Association and associated Council documents entitled "Statement of Basic Accreditation Principles" and the Essentials in accordance with the accompanying Resolution of Association.

Dated this _____ day of _____.

Name (representing collaborating
organization; or sponsoring institution)
etc.

RESOLUTION OF ADOPTION BY COLLABORATING ORGANIZATIONS

THIS RESOLUTION is for the purpose of constituting the operation of the agency "International Montessori Accreditation Council" in accordance with its pertinent documents entitled Articles of Association, "Statement of Basic Accreditation Principles" and the *Essentials*.

WHEREAS the undersigned by its duly authorized representative hereby expresses its intention to participate as a collaborating organization in the accreditation of its affiliated Montessori teacher education program(s) in accordance with the pertinent referenced Council documents, IT IS HEREBY AGREED AS FOLLOWS:

- (1) To designate specific individuals to serve on the review committee of the collaborating organization;
- (2) To designate a qualified individual to serve as a member of the Council's Board of Directors;
- (3) To adopt the Council's *Essentials* as authoritative standards for all further accreditation activities of the collaborating organization with respect to its affiliated Montessori teacher education program(s); it being understood that specific applicable Criteria will also be adopted;
- (4) To conduct elections or otherwise to provide for appropriate representation of affiliated program(s) on the Council's Board of Directors; such representation to attend with full voting authority in such capacity at the first organizational meeting referenced in paragraph (7).
- (5) To identify each of its affiliated Montessori teacher education program(s) and pertinent Program Delegates, specifying for each such program an initial accreditation status as follows:
 - a. Accreditation (not to exceed a five-year term): To provide assurance that a self-study and on-site visit has been satisfactorily completed within a period of five years from the new proposed date of accreditation with respect to the applicable program; such procedures being in substantial compliance with accreditation standards and requirements as set forth in pertinent Council documents.
 - b. Accreditation with Qualification (two-year term): To provide assurance that program operation will be promptly brought into compliance with all applicable Council accreditation standards; qualification being that a satisfactory self-study and on-site visit shall be conducted according to Council procedures and requirements within such two-year term and that an affirmative recommendation will be made within such time by the appropriate review committee as to accreditation action by the Council.
- (6) To provide to any signatory of this resolution (or to any signatory of a similar document entitled "Resolution of Adoption by Unaffiliated Sponsoring Institutions"), upon request, pertinent information or documentation to substantiate the collaborating organization's compliance with the specific terms and conditions of this resolution;
- (7) Upon timely compliance with terms (1) - (6) herein stated, to attend by designated Board member representative a first organizational meeting to confirm adoption of the Articles of Association, determine initial levels of Council fees, vote on chairperson of the Board, appointment of members of the Advisory Committee, Generic Review Committee, and to otherwise conduct initial Council business as may be properly brought before such meeting. It is understood that there shall be reasonable advance written notice to all other signatories of this resolution and other parties similarly qualified by resolution to attend

and participate at this meeting concerning nominees, appointments and other pertinent matters which are to be the substance and essential business of such meeting.

8) This resolution shall be construed as a constructive incorporation of all pertinent prior accreditation activities which have been previously conducted by or for the participating collaborating organization with respect to its affiliated program(s).

Dated this _____ day of _____

(authorized signature)

Name

Collaborating Organization

RESOLUTION OF ADOPTION BY UNAFFILIATED SPONSORING INSTITUTIONS

THIS RESOLUTION is for the purpose of establishing the operation of the agency "International Montessori Accreditation Council", in accordance with its pertinent documents entitled Articles of Association, "Statement of Basic Accreditation Principles" and the *Essentials*.

WHEREAS the undersigned by its duly authorized representative hereby expresses its intention to participate as a sponsoring institution unaffiliated with any collaborating organization in the accreditation of its Montessori teacher education program in accordance with the pertinent referenced Council documents, IT IS HEREBY AGREED AS FOLLOWS:

(1) To designate a specific qualified person to serve as its Program Delegate to the Council;

(2) To adopt the Council's *Essentials and Criteria* which are specified as such for use by the Council's Generic Review Committee.

(3) To specify an initial accreditation status of the program as follows:

(a) Accreditation (not to exceed a five-year term): To provide assurance that a self-study and on-site visit has been satisfactorily completed within a period of five years from the new proposed date of accreditation; such procedures being in substantial compliance with accreditation standards and requirements as set forth in pertinent Council documents.

(b) Accreditation with Qualification (two-year term): To provide assurance that program operation will be promptly brought into compliance with all applicable Council accreditation standards; qualification being that a satisfactory self-study and on-site visit shall be conducted according to Council procedures and requirements within such two-year term and that an affirmative recom-

mendation will be made within such time by the Generic Review Committee as to accreditation action by the Council.

- (4) To provide to any signatory of this resolution (or to any signatory of a similar document entitled "Resolution of Adoption by Collaborating Organizations"), upon request, pertinent information or documentation to substantiate the program's compliance with the specific terms and conditions of this resolution;
- (5) Upon timely compliance with paragraphs (1) - (4) herein stated, to participate by designated Program Delegate in a written ballot with other unaffiliated sponsoring institutions to elect representation to serve on the Council's Board of Directors and to have such duly elected representation to attend a first Council organizational meeting to confirm adoption of the Articles of Association, determine initial levels of Council fees, vote on chairperson of the Board, vote on appointment of members of the Advisory Committee, Generic Review Committee, and to otherwise conduct initial Council business as may be properly brought before such meeting. It is understood that there shall be reasonable advance written notice to all other signatories of this resolution and other parties similarly qualified by resolution to attend and participate at this meeting concerning nominees, appointments and other pertinent matters which are to be the substance and essential business of such meeting.

Dated this _____ day of _____

(authorized signature)

Name
Sponsoring Institution